



Office of Montana Secretary of State Linda McCulloch



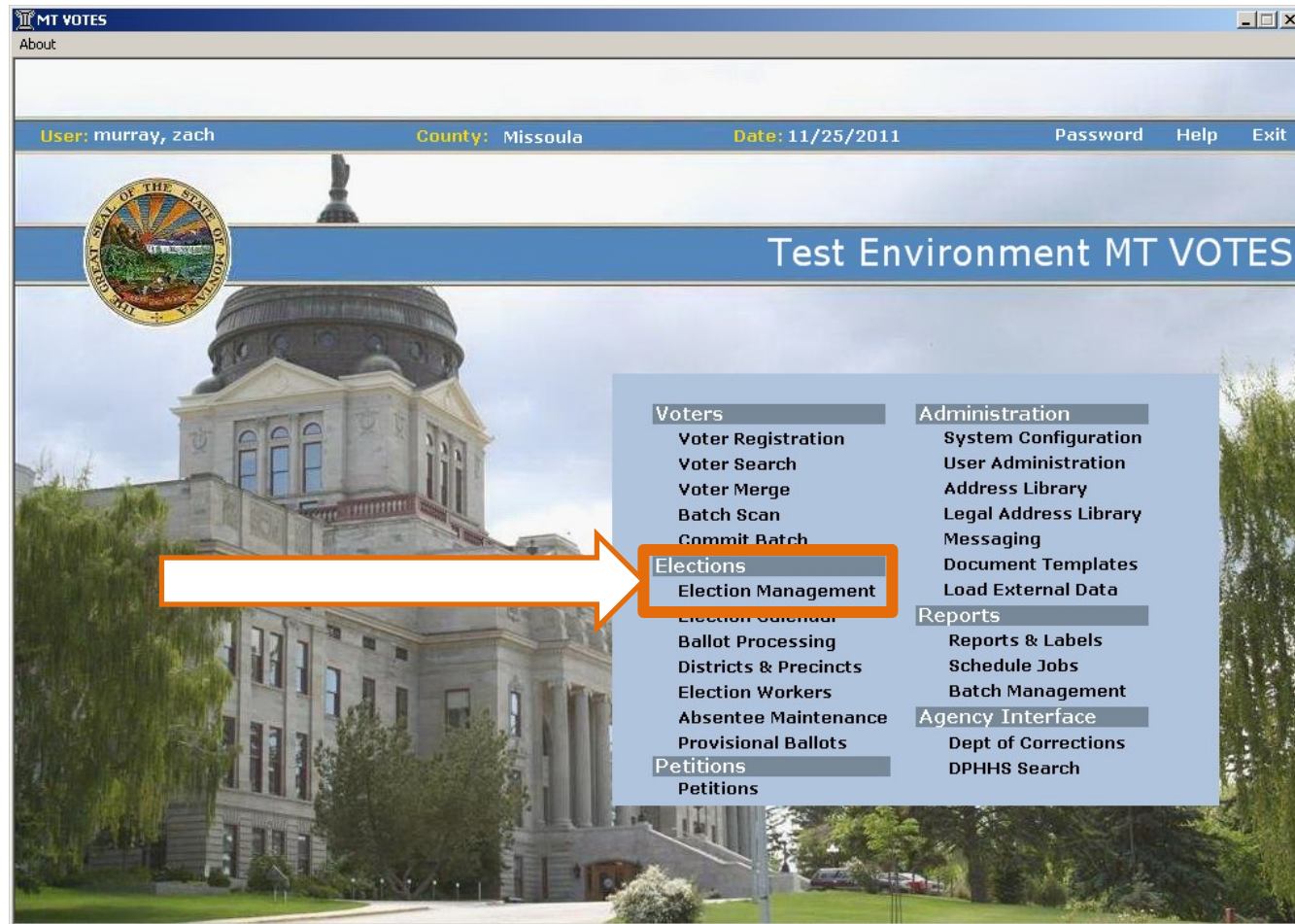
Election Management

Overview Of Topics Covered In This Training Guide

- Creating a New Election
- Adding Issues and Offices
- Generating Ballot Styles
- Printing Absentee and Mail Ballot Labels
- Generating Official Register
- Processing Mail Ballots
- Processing Official Register
- Closing an Election

Election Management

Election Management



Election Management–

Creating a New Election

- Election Management is the first screen that will display.
- From this screen you can search on existing elections.
- For existing elections you can view election Details, Delete an election, or Cancel an election.
- Click **New** to create a new election.

The screenshot shows the 'Election Management' application window. It features a search interface with fields for 'Election Date', 'Description', and 'Election Year', along with an 'Election Type' dropdown. Checkboxes for 'Show Closed' and 'Show Deleted/Cancelled' are present, along with 'Search' and 'Clear' buttons. A table with columns 'Election Date', 'Election Type', and 'Description' is displayed below. At the bottom left, a 'New' button is highlighted with a large orange arrow, indicating the action to create a new election. A 'Close' button is located at the bottom right.

Election Details

Election Date

- Enter Election Date in MM/DD/YYYY fashion.

[illegible]

Election Details– Election Description

- Enter in an Election Description using standard election naming conventions.

i.e., County Code (same as used on license plates),
Type of Election, year of
Election

Example:

11 Municipal General 2011

The screenshot shows the 'Election Management' application window. The 'Election Description' form is active, with the following fields filled:

- Election Date: 12/08/2011
- Description: 11 Example Election 2011
- Election Type: (empty dropdown)
- Election Method: Poll
- Filing Deadline: 09/24/2011
- Closing Date for Registration: (empty)
- Official County: 12/08/2011
- Canvass Votes Date: (empty)
- Poll Hours: Close 8:00 PM
- Publication Dates: Start 11/18/2011, End 12/04/2011

An orange arrow points to the 'Description' field. Below the form is a table with the following columns: District, Control County, # Of Offices, and # Of Issues. The table is currently empty. At the bottom of the window, there is a checkbox for 'Process completed' and a 'Save' button.

Election Type

- Select an Election Type from the dropdown box.

The screenshot shows the "Election Management" application window. At the top is a menu bar with options: Ballot Styles, Address Library, Pull Petitions, Polling Places, CASS, Districts Precincts, and Reports. On the right side of the header are links for Voter Search and Help.

The main area is divided into several sections:

- Election Details**: A sidebar on the left containing a vertical list of blue hyperlinks: Election Details, Include Certified Contests, Pull Contests, Issues & Offices, Publish Certified Contests, Ballot Styles, Ballot Review, Print Labels, Official Register, Election Expenses, Election Results, Process Official Register, Duplicate Ballot Report, Close Election, and Exit.
- Main Form**: Contains fields for Election Date (12/08/2011), Description (11 Example election 2011), Election Type (Special - highlighted by a red arrow), Filing Deadline (09/24/2011), Poll Hours (Open at 7:00 AM), Publication Dates (Start: 11/18/2011, End: 12/04/2011), and a section for Clerk Registration (Official County: 12/08/2011, Canvass Votes Date).
- Districts**: A table with columns: District, Control County, # Of Offices, and # Of Issues. The table body is currently empty.
- Statistics**: An empty panel on the right side of the main form.

At the bottom of the window, there is a checkbox labeled "Process completed" which is unchecked, and a "Save" button on the right.

Election Method

- Select an Election Method from the dropdown box.

[illegible]

Closing Date for Registration

- Enter the Closing Date for Registration in MM/DD/YY format.

The screenshot displays the "Election Management" application window. The title bar includes standard Windows icons and the text "Election Management". Below the title bar is a menu bar with the following items: Ballot Styles, Address Library, Pull Petitions, Polling Places, CASS, Districts Precincts, and Reports.

In the top right corner, there are links for "Voter Search" and "Help".

The main interface is divided into several sections:

- Election Details:** This section contains a vertical list of links on the left: "Election Details", "Include Certified Contests", "Pull Contests", "Issues & Offices", "Ballot Review", "Print Labels", "Official Register", "Election Expenses", "Election Results", "Process Official Register", "Duplicate Ballot Report", "Close Election", and "Exit". To the right of these links are form fields for:
 - Election Date: 12/08/2011
 - Description: 11 Example election 2011
 - Election Type: Special (with a dropdown arrow)
 - Election Method: Vote by Mail (with a dropdown arrow)
 - Closing Date for Registration: 11/11/2011
 - Official County Canvass Votes Date: 12/08/2011
- Poll Hours:** A section with two input fields: Open (7:00 AM) and Close (8:00 PM).
- Publication Dates:** A section with two input fields: Start (11/18/2011) and End (12/04/2011).
- Districts:** A table with four columns: District, Control County, # Of Offices, and # Of Issues. The table is currently empty.
- Statistics:** An empty box intended for statistical data.

An orange arrow points from the "Election Details" link in the left sidebar to the "Election Type" field.

At the bottom of the window, there is a checkbox labeled "Process completed" and a "Save" button.

Election Details– System Populated Dates

- Verify that all system populated dates are showing correctly.
- Fields to verify:
 - Filing Deadline
 - Official County Canvass Votes Date
 - Poll Hours
 - Publication dates

The screenshot shows the 'Election Management' software interface. The 'Election Details' section is active, displaying the following information:

- Election Date:** 11 Example election 2011
- Election Type:** Special
- Election Method:** Vote by Mail
- Filing Deadline:** 09/24/2011
- Closing Date for Registration:** 11/11/2011
- Official County Canvass Votes Date:** 12/08/2011
- Poll Hours:** Open 7:00 AM, Close 8:00 PM
- Publication Dates:** Start 11/18/2011, End 12/04/2011

Four orange arrows point to the following fields:

- Arrow 1 points to the **Filing Deadline** field (09/24/2011).
- Arrow 2 points to the **Official County Canvass Votes Date** field (12/08/2011).
- Arrow 3 points to the **Poll Hours** section (Open 7:00 AM, Close 8:00 PM).
- Arrow 4 points to the **Publication Dates** section (Start 11/18/2011, End 12/04/2011).

The interface also includes a 'Districts' table with columns for District, Control County, # Of Offices, and Issues. The table is currently empty. At the bottom, there is a 'Process comp' checkbox and a 'Save' button.

Save Election Details

- A green checkmark will display next to election detail to indicate it is completed.

[illegible]

Save Election Details

- Click **Refresh Wizard Status**

[illegible]

Helpful Hint–

- Any time **Process Completed** has been checked, **Always** click **Refresh Wizard Status** for an updated view of what has been accomplished.

Include Certified Contests

Include Certified Contests—

Overview

- The Include Certified Contests screen allows you to accept shared contests from either the State or other counties.
- E.G., President or Governor contests.
- If contests are available you can click on them and click **Save** to bring them into your election.

The screenshot shows the 'Election Management' application window. The title bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts Precincts', and 'Reports'. The main header displays 'Election Date: Dec-08-2011', 'Election Type: Special', and 'Description: 11 Example election 2011'. The sidebar on the left contains a list of links: 'Election Details', 'Include Certified Contests' (highlighted with an orange arrow), 'Pull Contests', 'Is...', 'Public Certified Contests', 'Ballot...', 'Ballot...', 'Print...', 'Office...', 'Election...', 'Election...', 'Production...', 'Duplicate...', 'Close...', and 'Exit...'. The main area features a table titled 'Shared Districts' with columns 'District' and 'Certifying Jurisdiction'. To the right of the table are two sections: 'Include Offices' and 'Include Issues', each with a list of items. At the bottom left, there is a 'Refresh Wizard Status' link. At the bottom right, there are 'Save' and 'Select All' buttons. An orange arrow points from the 'Refresh Wizard Status' link to the 'Save' button.

- Click Process Completed when finished with this screen.
- Refresh Wizard Status

Pull Contests

Pull Contests— Overview

- The Pull Contests screen will display a list of available contests that have been setup with your Districts and Precincts.
- Check the box next to the desired Positions and click **Save** to pull them into your election.

The screenshot shows the 'Election Management' application window. The top menu bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts Precincts', and 'Reports'. The main area is titled 'Election Date: Dec-08-2011', 'Election Type: Special', and 'Description: 11 Example election 2011'. On the left, a sidebar contains links: 'Election Details', 'Include Certified Contests', 'Pull Contests' (highlighted with an orange arrow), 'Jobs & Offices', 'Certified Contests', 'Types', 'Review', 'Labels', 'Register', 'Expenses', 'Results', 'Official Register', 'Ballot Report', and 'Election'. The main area displays a list of contests and positions, including 'Seeley Lake Community Council', 'Seeley Lake County Water District', 'Sunny Meadows Water & Sewer', 'Swan Valley Community Council', 'Target Range Sewer & Water District', 'Turah Meadows County Sewer & Water District', and 'West Valley Community Council'. Each contest has a checkbox for 'Incumbent Candidates' (highlighted with an orange arrow). Below the list is a 'Summary' table with columns for 'District', 'Position', and 'Candidates'. At the bottom, there is a 'Process Completed' checkbox (highlighted with an orange arrow) and 'Select All' and 'Save' buttons.

- Click Process Completed when finished with this screen.
- Refresh Wizard Status

Issues & Offices

Issues & Offices –

Creating New Office

- If your election includes contests or issues that were not able to be pulled into your election from earlier steps you will have to enter them manually.
- Click **New** to begin.

The screenshot shows the 'Election Management' application window. The top menu bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts Precincts', and 'Reports'. The main header displays 'Election Date: Dec-08-2011', 'Election Type: Special', and 'Description: 11 Example election 2011'. On the left, a sidebar lists various election components, with 'Issues & Offices' highlighted. A large orange arrow points from the bottom of the sidebar to the 'New' button in the 'Offices' section. The 'Offices' section contains a table with columns for 'Code - Name' and 'Control County'. Below the table are 'New', 'Details', and 'Delete' buttons. The 'Candidates' section below it has a table with columns for 'Name', 'Political Party', 'Status', 'Ballot Position', and 'Pe'. The 'Issues' section at the bottom has a table with columns for 'Caption' and 'Issues #', and includes 'New', 'Details', 'Delete', and 'Issue Sequences' buttons. A 'Process Completed' checkbox is visible at the bottom left of the main area.

Issues & Offices –

Election Offices

- Select the District Type from the Dropdown box.

The screenshot shows the 'Election Offices' application window. The 'District Type' dropdown menu is open, displaying a list of district types. The 'WARD' option is currently selected and highlighted. An orange arrow points to the 'District Type' label. Below the dropdown, there is a 'Political Party' dropdown menu, a 'Vote For Number' text box containing the value '1', and an 'Is Primary' checkbox which is unchecked. At the bottom of the window, there are three buttons: 'Save & Add New', 'Save', and 'Close'. A 'Help' link is visible in the top right corner of the window.

District Type
SCHOOL DISTRICT
SCHOOL SINGLE MEMBER TRUSTEE
SEWER
SOIL CONSERVATION DISTRICT
URBAN TRANSPORTATION DISTRICT
WARD
WATER & SEWER
WATER DISTRICT

Issues & Offices –

Election Offices

- Select the desired District from the Dropdown box.
- Verify that you have selected the correct District Type if the district you need is not showing.

The screenshot shows the 'Election Offices' application window. The 'District Type' dropdown menu is set to 'WARD'. The 'District' dropdown menu is open, displaying a list of wards: 'WARD 1', 'WARD 2', 'WARD 3', 'WARD 4', 'WARD 5', and 'WARD 6'. 'WARD 1' is currently selected and highlighted. An orange arrow points to the 'District' dropdown menu. Below the 'District' dropdown is a text input field for 'Political Party'. At the bottom, there is a 'V For Number' field with the value '1' and an 'Is Primary' checkbox which is unchecked. The bottom of the window contains three buttons: 'Save & Add New', 'Save', and 'Close'. A 'Help' link is visible in the top right corner.

Issues & Offices –

Election Offices

- Available Positions within the selected district will be displayed.
- Choose which position you are including in your election.
- Enter in the Political party and Voter For Number.
- Do not use the Is primary checkbox.

The screenshot shows the 'Election Offices' application window. The 'District Type' is set to 'WARD' and the 'District' is 'WARD 3'. The 'Position' list box contains two entries: 'City Council Member Ward 3(JAFFE, BOB / JAFFE, BOB)' and 'City Council Member Ward 3(RYE, STACY)'. The 'Political Party' field is empty. The 'Vote For Number' is set to '1' and the 'Is Primary' checkbox is unchecked. The window has buttons for 'Save & Add New', 'Save', and 'Close'. Three orange arrows point to the 'Position' list box, the 'Political Party' field, and the 'Vote For Number' field.

- Click **Save** to continue.
- Click **Save & Add New** to add in additional offices.

Creating New Offices

- Your new office will now display on the Issues & Offices screen.
- Repeat the previous steps to add in additional contests if needed.

Election Management

Ballot Styles Address Library Pull Petitions Polling Places CASS Districts Precincts Reports

[Voter Search](#) [Help](#)

Election Date: Dec-08-2011 **Election Type:** Special **Description:** 11 Example election 2011

Districts

Code - Name	Control County
WARD 3 - WARD 3	Missoula

Offices

City Council Member Ward 3

Candidates

Name	Political Party	Status	Ballot Position	Pe
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Issues

Caption	Issues #
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☐ Process Completed

[Refresh Wizard Status](#)

Issues & Offices – Adding Candidates

- Once your offices have been added, you can add in candidates as needed.
- Highlight the office you are adding a candidate to and click **New** under candidates to begin.

The screenshot shows the 'Election Management' application window. The top menu bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts Precincts', and 'Reports'. The main window has a sidebar on the left with a list of actions: 'Election Details', 'Include Certified Contests', 'Pull Contests', 'Issues & Offices' (highlighted), 'Publish Certified Contests', 'Ballot Styles', 'Ballot Review', 'Print Labels', 'Official Register', 'Election Expenses', 'Election Results', 'Process Official Register', 'Duplicate Ballot Report', 'Close Election', and 'Exit'. The main area displays 'Election Date: Dec-08-2011', 'Election Type: Special', and 'Description: 11 Example election 2011'. Below this is a table of 'Offices' with columns for 'District', 'Code', and 'Description'. The first row is 'WARD 3' with 'City Council Member Ward 3' in the description. To the right of this table is a 'Candidates' section with a table with columns 'Name', 'Political Party', 'Status', 'Ballot Position', and 'Pe'. Below the 'Candidates' table is a 'New' button. An orange arrow points from the 'City Council Member Ward 3' office entry to the 'New' button under the 'Candidates' section.

Issues & Offices – Adding Candidates

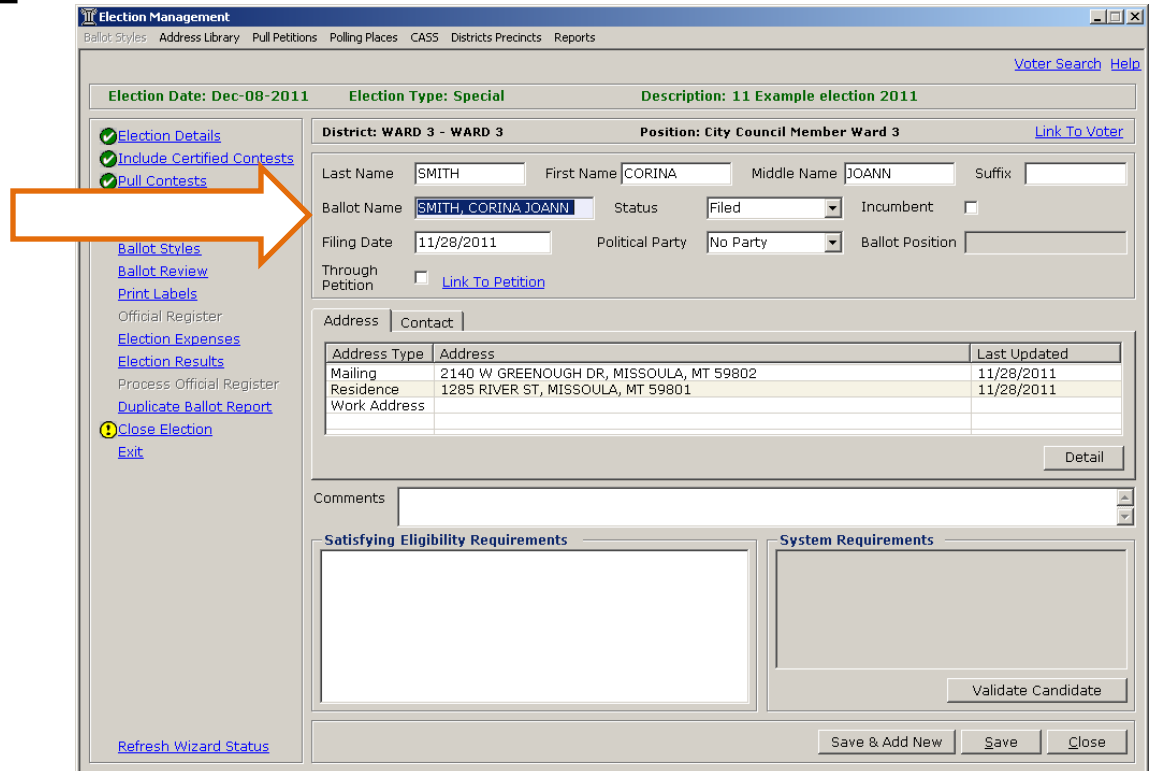
- On the following screen enter the candidates information and click Link to Voter.
- The candidates information will automatically populate if a matching voter record is found.

The screenshot shows the 'Election Management' application window. The top menu bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts/Precincts', and 'Reports'. The main header displays 'Election Date: Dec-08-2011', 'Election Type: Special', and 'Description: 11 Example election 2011'. On the left, a sidebar contains a list of links: 'Election Details', 'Include Certified Contests', 'Pull Contests', 'Issues & Offices' (highlighted), 'Publish Certified Contests', 'Ballot Styles', 'Ballot Review', 'Print Labels', 'Official Register', 'Election Expenses', 'Election Results', 'Process Official Register', 'Duplicate Ballot Report', 'Close Election' (with a warning icon), and 'Exit'. At the bottom of the sidebar is a 'Refresh Wizard Status' link. The main content area is titled 'District: WARD 3 - WARD 3' and 'Position: City Council Member Ward 3'. It contains a 'Link To Voter' button. Below this, there are input fields for 'Last Name' (SMITH), 'First Name' (CORINA), 'Middle Name' (JOANN), and 'Suffix'. A 'Ballot Name' field contains 'SMITH, CORINA JOANN'. There are dropdown menus for 'Status' (set to 'Filed') and 'Political Party' (set to 'No Party'). A 'Filing Date' field is set to '11/28/2011'. A 'Through Petition' checkbox is present, with a 'Link To Petition' link next to it. Below these fields is a table for 'Address' and 'Contact' information. The table has columns for 'Address Type', 'Address', and 'Last Update'. It lists 'Mailing' (2140 W GREENOUGH DR, MISSOULA, MT 59802, 11/28/2011), 'Residence' (1285 RIVER ST, MISSOULA, MT 59801, 11/28/2011), and 'Work Address'. At the bottom, there are 'Comments' and 'Satisfying Eligibility Requirements' and 'System Requirements' sections. A 'Validate Candidate' button is located at the bottom right. At the very bottom, there are 'Save & Add New', 'Save', and 'Close' buttons.

Issues & Offices –

Adding Candidates

- If necessary, change Ballot Name, select Political Party, mark whether an incumbent and add contact information.



The screenshot shows the 'Election Management' application window. The top menu bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts Precincts', and 'Reports'. The main header displays 'Election Date: Dec-08-2011', 'Election Type: Special', and 'Description: 11 Example election 2011'. The left sidebar contains a list of links: 'Election Details', 'Include Certified Contests', 'Pull Contests', 'Ballot Styles', 'Ballot Review', 'Print Labels', 'Official Register', 'Election Expenses', 'Election Results', 'Process Official Register', 'Duplicate Ballot Report', 'Close Election', and 'Exit'. An orange arrow points from the 'Ballot Name' field in the main form to the 'Ballot Styles' link. The main form displays candidate information for 'District: WARD 3 - WARD 3' and 'Position: City Council Member Ward 3'. The candidate's name is 'SMITH, CORINA JOANN', with 'Last Name' as 'SMITH', 'First Name' as 'CORINA', and 'Middle Name' as 'JOANN'. The 'Ballot Name' is 'SMITH, CORINA JOANN'. The 'Status' is 'Filed', 'Incumbent' is unchecked, 'Filing Date' is '11/28/2011', and 'Political Party' is 'No Party'. The 'Through Petition' checkbox is unchecked, and there is a 'Link To Petition' link. Below the candidate information is a table for 'Address' and 'Contact' information. The table has columns for 'Address Type', 'Address', and 'Last Updated'. The data rows are: 'Mailing' at '2140 W GREENOUGH DR, MISSOULA, MT 59802' updated '11/28/2011', 'Residence' at '1285 RIVER ST, MISSOULA, MT 59801' updated '11/28/2011', and 'Work Address' is empty. At the bottom right of the table is a 'Detail' button. Below the table is a 'Comments' section. At the bottom of the form are two sections: 'Satisfying Eligibility Requirements' and 'System Requirements', both with empty text areas. At the bottom right of the form are buttons for 'Validate Candidate', 'Save & Add New', 'Save', and 'Close'. A 'Refresh Wizard Status' link is at the bottom left of the sidebar.

Address Type	Address	Last Updated
Mailing	2140 W GREENOUGH DR, MISSOULA, MT 59802	11/28/2011
Residence	1285 RIVER ST, MISSOULA, MT 59801	11/28/2011
Work Address		

Issues & Offices –

Validating Candidates

- To validate the candidate you will first need to check that they Satisfy Eligibility Requirements.
- System requirements will be checked automatically if the candidate qualifies.
- Click **Validate Candidate**.

The screenshot shows a web form for validating a candidate. It is divided into two main sections. The left section, titled 'Satisfying Eligibility Requirements', contains a single checkbox labeled 'County residency'. The right section, titled 'System Requirements', contains three checkboxes: 'Lives within district', 'Correct political party', and 'Filed within deadline'. The 'Correct political party' checkbox is highlighted with a yellow background. At the bottom right of the form is a button labeled 'Validate Candidate'. Two large orange arrows are overlaid on the image: one points to the 'County residency' checkbox, and the other points to the 'Validate Candidate' button.

Issues & Offices – Adding Candidates

- Click **Save** to add the new candidate to your election.
- If you have multiple candidates to add click **Save & New** to reset the screen and add them.

Election Management
Ballot Styles | Address Library | Pull Petitions | Polling Places | CASS | Districts Precincts | Reports

[Voter Search](#) [Help](#)

Election Date: Dec-08-2011 Election Type: Special Description: 11 Example election 2011

District: WARD 3 - WARD 3 Position: City Council Member Ward 3 [Link To Voter](#)

Last Name: SMITH First Name: CORINA Middle Name: JOANN Suffix:
Ballot Name: SMITH, CORINA JOANN Status: Filed Incumbent:
Filing Date: 11/28/2011 Political Party: No Party Ballot Position:
Through Petition: ☐ [Link To Petition](#)

Address | Contact |
Address Type | Address | Last Updated
Mailing | 2140 W GREENOUGH DR, MISSOULA, MT 59802 | 11/28/2011
Residence | 1285 RIVER ST, MISSOULA, MT 59801 | 11/28/2011
Work Address | |
[Detail](#)

Comments:
[Satisfying Eligibility Requirements](#) [System Requirements](#)
[Validate Candidate](#)
[Save](#) [Close](#)

[Refresh Wizard Status](#)

Issues & Offices – Adding Candidates

- The new candidate will now display for the selected office.
- Repeat the previous steps to add additional candidates if necessary.
- Candidates can now be certified.

The screenshot shows the 'Election Management' application window. The top menu bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts/Precincts', and 'Reports'. The main header displays 'Election Date: Dec-08-2011', 'Election Type: Special', and 'Description: 11 Example election 2011'. On the left, a sidebar contains a list of actions: 'Election Details', 'Include Certified Contests', 'Pull Contests', 'Issues & Offices', 'Publish Certified Contests', 'Ballot Styles', 'Ballot Review', 'Print Labels', 'Official Register', 'Election Expenses', 'Election Results', 'Process Official Register', 'Duplicate Ballot Report', 'Close Election', and 'Exit'. The 'Close Election' item is highlighted with a yellow icon. The main area is divided into three sections: 'Districts', 'Offices', and 'Candidates'. The 'Districts' section shows a table with 'Code - Name' and 'Control County', containing one entry: 'WARD 3 - WARD 3' in 'Missoula'. The 'Offices' section shows a table with 'City Council Member Ward 3'. The 'Candidates' section shows a table with columns 'Name', 'Political Party', 'Status', 'Ballot Position', and 'Pe'. One candidate is listed: 'SMITH, CORINA...' with 'No Party', 'Filed', '1', and 'NO'. An orange arrow points to the 'Candidates' table. At the bottom, there are buttons for 'New', 'Details', 'Delete', and 'Issue Sequences', and a checkbox for 'Process Completed'.

Code - Name	Control County
WARD 3 - WARD 3	Missoula

Name	Political Party	Status	Ballot Position	Pe
SMITH, CORINA...	No Party	Filed	1	NO

Issues & Offices – Certify Candidates

- Highlight the candidate to be certified.
- Click **Details**.

The screenshot shows the 'Election Management' application window. The top menu bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts/Precincts', and 'Reports'. The main header displays 'Election Date: Dec-08-2011', 'Election Type: Special', and 'Description: 11 Example election 2011'. On the left is a sidebar with a list of actions: 'Election Details', 'Include Certified Contests', 'Pull Contests', 'Issues & Offices', 'Publish Certified Contests', 'Ballot Styles', 'Ballot Review', 'Print Labels', 'Official Register', 'Election Expenses', 'Election Results', 'Process Official Register', 'Duplicate Ballot Report', 'Close Election', and 'Exit'. The main area is divided into three panels: 'Districts' (with a table showing 'WARD 3 - WARD 3' and 'Missoula'), 'Offices' (with a table showing 'City Council Member Ward 3'), and 'Candidates' (with a table showing 'SMITH, CORINA...' and 'No Party'). An orange arrow points to the 'Details' button for the candidate 'SMITH, CORINA...'. Below the 'Candidates' panel is an 'Issues' panel with a table showing 'Caption' and 'Issues #'. Another orange arrow points to the 'Details' button in the 'Issues' panel. At the bottom of the 'Candidates' panel, there are buttons for 'New', 'Details', and 'Delete'. At the bottom of the 'Issues' panel, there are buttons for 'New', 'Details', 'Delete', and 'Issue Sequences'. A 'Process Completed' checkbox is located at the bottom left of the main area.

Code - Name	Control County
WARD 3 - WARD 3	Missoula

Name	Political Party	Status	Ballot Position	Pe
SMITH, CORINA...	No Party	Filed	1	NO

Caption	Issues #
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Issues & Offices – Certify Candidates

- In the Status field dropdown choose **Certified**.
- Click **Save**.

The screenshot shows the 'Election Management' application window. The top navigation bar includes links for Ballot Styles, Address Library, Pull Petitions, Polling Places, CASS, Districts/Precincts, and Reports. The main header displays 'Election Date: Dec-08-2011', 'Election Type: Special', and 'Description: 11 Example election 2011'. On the left, a sidebar lists various actions: Election Details, Include Certified Contests, Pull Contests, Issues & Offices (highlighted with a green checkmark), Publish Certified Contests, Ballot Styles, Ballot Review, Print Labels, Official Register, Election Expenses, Election Results, Duplicate Ballot Report, Close Election, and Exit. The main form area is for 'District: WARD 3 - WARD 3' and 'Position: City Council Member Ward 3'. It contains fields for Last Name (SMITH), First Name (CORINA), Middle Name (JOANN), and Suffix. The 'Status' dropdown menu is open, showing options: Filed, Certified (selected), Withdrawn, and Contested. Other fields include Ballot Number, Filing Date (11/28/2011), Political Party, Incumbent (checkbox), and Ballot Position (1.00). Below these is an 'Address' section with a table of addresses (Mailing, Residence, Work) and their last updated dates. At the bottom, there are 'Satisfying Eligibility Requirements' and 'System Requirements' sections, a 'Validate Candidate' button, and a 'Save & Add New' button. An orange arrow points to the 'Save' button.

Address Type	Address	Last Updated
Mailing	2140 W GREENOUGH DR, MISSOULA, MT 59802	11/28/2011
Residence	1285 RIVER ST, MISSOULA, MT 59801	11/28/2011
Work Address		

Issues & Offices – Certify Candidates

- The candidate is now certified.
- Repeat the previous steps for additional candidates as needed.

The screenshot shows the 'Election Management' application window. The top menu bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts Precincts', and 'Reports'. The main header displays 'Election Date: Dec-08-2011', 'Election Type: Special', and 'Description: 11 Example election 2011'. On the left, a sidebar contains a list of actions: 'Election Details', 'Include Certified Contests', 'Pull Contests', 'Issues & Offices', 'Publish Certified Contests', 'Ballot Styles', 'Ballot Review', 'Print Labels', 'Official Register', 'Election Expenses', 'Election Results', 'Process Official Register', 'Duplicate Ballot Report', 'Close Election', and 'Exit'. The main area is divided into three sections: 'Districts', 'Offices', and 'Candidates'. The 'Candidates' section contains a table with the following data:

Name	Political Party	Status	Ballot Position	Pe
SMITH, CORINA...	No Party	Filed	1	NO

An orange arrow points to the 'Candidates' table. Below the table are buttons for 'New', 'Details', and 'Delete'. At the bottom of the window, there is a 'Process Completed' checkbox and a 'Refresh Wizard Status' link.

Issues & Offices –

Creating New Issues

- Click the **New** button under Issues to add in a new issue to your election.

The screenshot shows the 'Election Management' application window. The top menu bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts/Precincts', and 'Reports'. The main area displays election details for 'Dec-08-2011', 'Special' type, and '11 Example election 2011'. On the left, a sidebar lists various functions, with 'Issues & Offices' highlighted. The central pane shows a table for 'Districts' with columns 'Code - Name' and 'Control County', containing one entry: 'WARD 3 - WARD 3' in 'Missoula'. On the right, there are sections for 'Offices' (with a 'City Council Member Ward 3' entry), 'Candidates' (with columns for Name, Political Party, Status, Ballot Position, and PE), and 'Issues' (with columns for Caption and Issues #). Each of these sections has a 'New', 'Details', and 'Delete' button. A large orange arrow points from the bottom left towards the 'New' button in the 'Issues' section.

Issues & Offices –

Creating New Issues

- Enter a unique Issue Number and selected the District Type and District from the corresponding dropdown boxes.

The screenshot displays the 'Election Management' application window. The top menu bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts/Precincts', and 'Reports'. The main header shows 'Election Date: Dec-08-2011', 'Election Type: Special', and 'Description: 11 Example election 2011'. On the left sidebar, the 'Issues & Offices' link is highlighted with a green checkmark and an orange arrow pointing to the 'Issues No.' field. The 'Issues No.' field contains the value '32'. Below it, the 'District Type' and 'District' dropdown menus are visible. The main content area has tabs for 'General' and 'Result Of/Impact'. The 'General' tab is active, showing fields for 'Caption', 'Question', and 'Summary', each with character and word counts. There are also checkboxes for '50% Eligibility Applies' and '60% Eligibility Applies'. At the bottom, there is a 'Campaign Committee if any' field and buttons for 'Save & Add New', 'Save', and 'Close'.

Issues & Offices –

Creating New Issues

- Enter a Caption for the issue.
- Enter the Question wording for the issue.
- Verify all information is showing correctly and click **Save**.
- Click Save & Add new to continue adding additional Issues.

The screenshot shows the 'Election Management' application window. The top menu bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts Precincts', and 'Reports'. The main header displays 'Election Date: Dec-08-2011', 'Election Type: Special', and 'Description: 11 Example election 2011'. Below this, there are fields for 'Issues No.' (32), a minus sign, '1', 'District Type' (FIRE), and 'District' (SEELEY LAKE FIRE). The 'General' tab is selected, showing a 'Caption' field with 'Test Fire Issue' and a 'Question' field with 'Test Fire Issue'. There are checkboxes for '50% Eligibility Applies' and '60% Eligibility Applies'. A 'Summary' field is also present. The left sidebar contains a list of actions: 'Election Details', 'Include Certified Contests', 'Pull Contests', 'Ballot Review', 'Print Labels', 'Election Results', 'Process Official Register', 'Duplicate Ballot Report', 'Close Election', and 'Exit'. The bottom right corner has buttons for 'Save & Add New', 'Save', and 'Close'.

Issues & Offices – Overview

- The new issue will show along with any other issues or contests you have added.
- Once you have finished adding all contests and issues check the Process Completed box.

Election Management
Ballot Styles Address Library Pull Petitions Polling Places CASS Districts Precincts Reports

Election Date: Dec-08-2011 **Election Type:** Special **Description:** 11 Example election 2011

Issues & Offices

- ✓ Election Details
- ✓ Include Certified Contests
- ✓ Pull Contests
- ✓ Issues & Offices
- ✓ Publish Certified Contests
- ⚠ Ballot Styles
- Ballot Review
- Print Labels
- Official Register
- Election Expenses
- Election Results
- Process Official Register
- Duplicate Ballot Report
- ⚠ Close Election
- Exit

[Refresh Wizard Status](#)

Districts

Code - Name	Control County
SLY FIRE - SEELEY LAKE ...	Missoula
WARD 3 - WARD 3	Missoula

Offices

New Details Delete

Candidates

Name	Political Party	Status	Ballot Position	Pe
------	-----------------	--------	-----------------	----

New Details Delete

Issues

Caption	Issues #
Test Fire Issue	1

New Details Delete Issue Sequences

☒ Process Completed

- Refresh Wizard Status

Publish Certified Contests

Publish Certified Contests— Overview

- The Publish Certified Contests screen allows you to share offices and issues you have entered with other counties that have shared districts.
- Check entries and click save to share them.
- Otherwise Check Process Completed

- Refresh Wizard Status

Ballot Styles

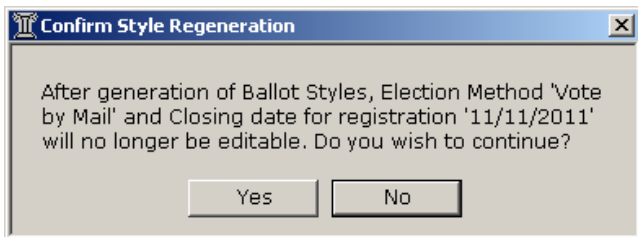
Ballot Styles – Generate Styles

- The next step to setup your election is to Generate Ballot Styles.
- You will need to Refresh Wizard Status if you have not been doing it after each prior step.

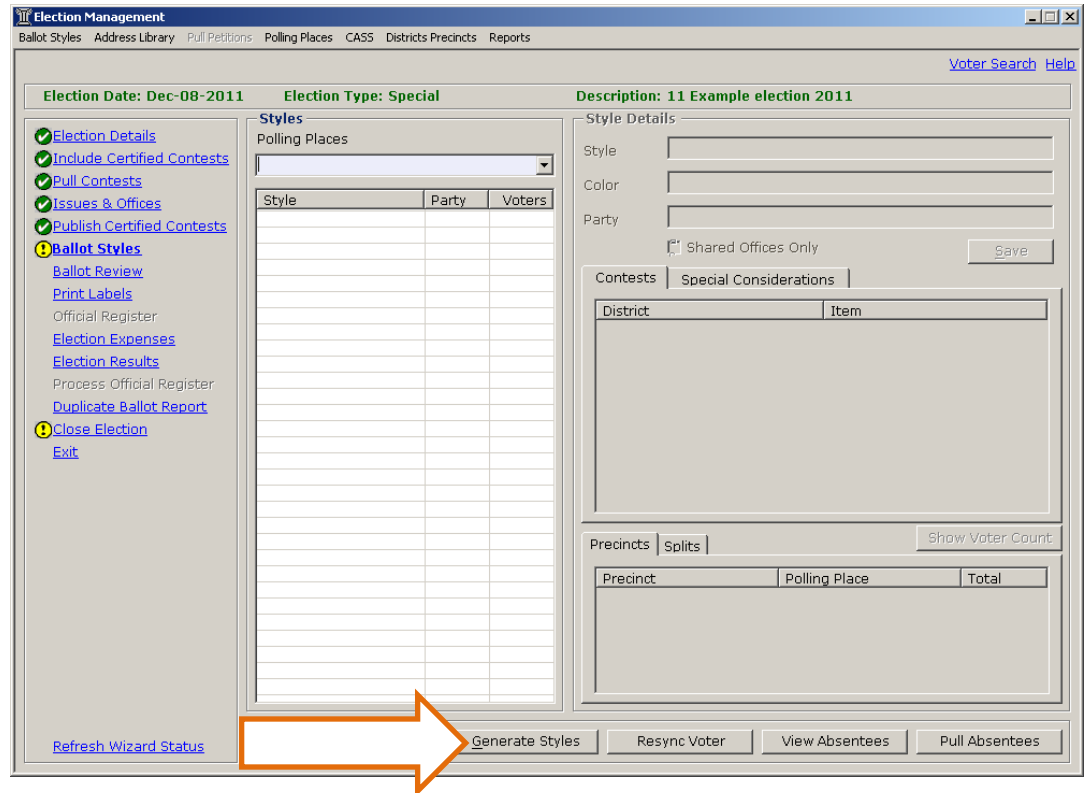
The screenshot shows the 'Election Management' software interface. The title bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts Precincts', and 'Reports'. The main window displays election details: 'Election Date: Dec-08-2011', 'Election Type: Special', and 'Description: 11 Example election 2011'. On the left sidebar, a list of steps is shown with checkboxes: 'Election Details', 'Include Certified Contests', 'Pull Contests', 'Issues & Offices', 'Publish Certified', 'Ballot Styles' (highlighted with an orange arrow), 'Ballot Review', 'Print Labels', 'Official Register', 'Election Expenses', 'Election Results', 'Process Official Register', 'Duplicate Ballot Report', 'Close Election', and 'Exit'. The 'Ballot Styles' step is currently active, showing a 'Polling Places' dropdown and a table with columns 'Style', 'Party', and 'Voters'. On the right, there are 'Style Details' fields for 'Style', 'Color', and 'Party', a 'Shared Offices Only' checkbox, and a 'Save' button. Below these are 'Contests' and 'Special Considerations' tabs, a 'District' and 'Item' table, and 'Precincts' and 'Splits' tabs with a 'Show Voter Count' button. At the bottom, there are buttons for 'Process Completed', 'Generate Styles', 'Resync Voter', 'View Absentees', and 'Pull Absentees'. A 'Refresh Wizard Status' link is also present in the bottom left.

Ballot Styles – Generate Styles

- Click the **Generate Styles** button to generate ballot styles.
- The following message will display, warning you that your election details will no longer be modifiable if you continue.

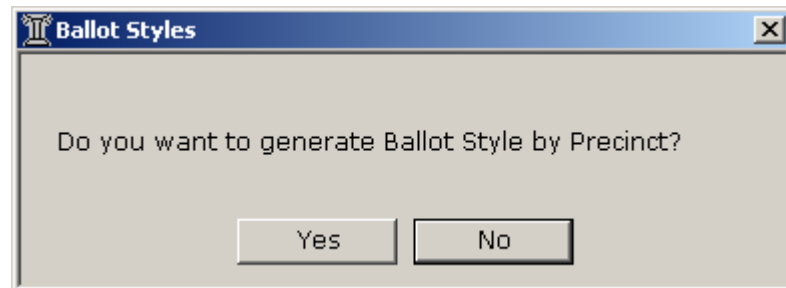


- Click **Yes** when ready.



Ballot Styles – Generate Styles

- You will next be asked if you want to generate Ballot Style's by Precinct.
- If so click **Yes**.
- Clicking **No** will generate Ballot Style by District.



Ballot Styles – Generate Styles

- Newly generated Ballot Styles will be listed under styles.
- A confirmation will display at the top of the screen.
- Ballot styles will generate with a default number for a name

Election Management
Ballot Styles generated successfully. (Please 'Refresh Wizard Status'.)

Election Date: Dec-08-2011 Election Type: Special Description: 11 Example election 2011

Styles

Polling Places

Style	Party	Voters
1		1375
2		9745

Style Details

Style: 1
Color:
Party:
☐ Shared Offices Only

Precincts | Splits

Precinct	Polling Place	Total
POTO 2 - POTOMAC 2	GREENOUGH POTOMAC...	
03 - PRECINCT 03	SEELEY LAKE ELEMENT...	
04 - PRECINCT 04	SEELEY LAKE ELEMENT...	
05 - PRECINCT 05	SUNSET SCHOOL	
SEEL 1 - SEELEY 1	SEELEY LAKE ELEMENT...	

☐ Process Completed

Default ballot style names do not correspond to their precinct number.

Refer to the precinct box to verify the ballot styles information.

Ballot Styles –

Resync Voter

- Clicking the Resync Voter buttons will cause MT Votes to re-pull in the voters encompassed by your ballot styles.
- Do not Resync voters if you have already printed and mailed labels, as this will invalidated the ballot ID's on the previous labels.

The screenshot shows the 'Election Management' application window. The top menu bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts Precincts', and 'Reports'. A status bar at the top indicates 'Ballot Styles generated successfully. (Please "Refresh Wizard Status".)' and provides links for 'Voter Search' and 'Help'.

The main interface is divided into several sections:

- Left Sidebar:** Contains a list of navigation links: 'Election Details', 'Include Certified Contests', 'Pull Contests', 'Issues & Offices', 'Publish Certified Contests', 'Ballot Styles' (highlighted with a yellow background and a warning icon), 'Ballot Review', 'Print Labels', 'Official Register', 'Election Expenses', 'Election Results', 'Process Official Register', 'Duplicate Ballot Report', 'Close Election' (highlighted with a yellow background and a warning icon), and 'Exit'.
- Top Section:** Displays 'Election Date: Dec-08-2011', 'Election Type: Special', and 'Description: 11 Example election 2011'.
- Styles Section:** Features a 'Polling Places' dropdown menu and a table with columns 'Style', 'Party', and 'Voters'. The table contains two rows: Style 1 with 1375 voters and Style 2 with 9745 voters.
- Style Details Section:** Includes input fields for 'Style' (set to 1), 'Color', and 'Party', along with a 'Shared Offices Only' checkbox and a 'Save' button.
- Contests Section:** Has tabs for 'Contests' and 'Special Considerations'. The 'Contests' tab shows a table with 'District' and 'Item' columns, containing one entry: 'SEELEY LAKE FIRE' with item '1 - Test Fire Issue'.
- Precincts Section:** Has tabs for 'Precincts' and 'Splits'. The 'Precincts' tab shows a table with 'Precinct', 'Polling Place', and 'Total' columns, listing several precincts and their corresponding polling places.
- Bottom Section:** Contains three buttons: 'Resync Voter', 'View Absentees', and 'Pull Absentees'. A large orange arrow points from the 'Resync Voter' button to the 'Ballot Styles' link in the left sidebar.

Ballot Styles – Generate Styles

- Ballot Styles can be renamed so as to be more easily recognizable.
- Click on the Ballot Style you would like to rename and then enter a new name under Style Details.
- Click **Save**

Election Management
Ballot Styles Address Library Pull Petitions Polling Places CASS Districts Precincts Reports

Election Date: Dec-08-2011 Election Type: Special Description: 11 Example election 2011

Styles
Polling Places

Style	Party	Voters
TEST 1		1375
2		9745

Style Details
Style: TEST 2
Color:
Party:
☐ Shared Offices Only **Save**

Contests | Special Considerations |
District: WARD 3 Item: City Council Member Wa

Precincts | Splits | Show Voter Count

Precinct	Polling Place	Total
LEWI 3 - LEWISCL 3	LEWIS & CLARK SCHOOL	
LOWE 1 - LOWELL 1	LOWELL SCHOOL	
PAXS 1 - PAXSON 1	PAXSON SCHOOL	
63 - PRECINCT 63	WASHINGTON SCHOOL	
66 - PRECINCT 66	ST JOSEPH SCHOOL	

☐ Process Completed **Generate Styles** Resync Voter View Absentees Pull Absentees

- Be sure to click **Save** after changing each style name or your modifications will be lost.

Ballot Styles – Generate Styles

- A confirmation message will display after each Ballot Style name is changed.
- The re-named ballot Styles will be listed under styles.
- Once a name has been used for a ballot style it cannot be applied to an alternative ballot style.

Election Management

Ballot Styles Address Library Pull Petitions Polling Places

Ballot Style successfully saved. Voter Search Help

Election Date: Dec-08-2011 Election Type: Special Description: 11 Example election 2011

Styles

Polling Places

Style	Party	Voters
TEST 1		1375
TEST 2		9745

Style Details

Style: TEST 2

Color:

Party:

☐ Shared Offices Only Save

Contests Special Considerations

District	Item
WARD 3	City Council Member Ward 3

Precincts Splits Show Voter Count

Precinct	Polling Place	Total
LEWI 3 - LEWISCLK 3	LEWIS & CLARK SCHOOL	
LOWE 1 - LOWELL 1	LOWELL SCHOOL	
PAXS 1 - PAXSON 1	PAXSON SCHOOL	
63 - PRECINCT 63	WASHINGTON SCHOOL	
66 - PRECINCT 66	ST JOSEPH SCHOOL	

Refresh Wizard Status

☐ Process Completed Generate Styles Resync Voter View Absentees Pull Absentees

Ballot Styles – Pull Absentees

- Next you will need to pull Absentee's into the election.
- This button will have different functionality depending on whether you are setting up a Poll or Vote-by-Mail Election.

The screenshot shows the 'Election Management' application window. The top menu bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts Precincts', and 'Reports'. A status bar at the top indicates 'Ballot Style successfully saved.' and provides links for 'Voter Search' and 'Help'.

The main interface is divided into several sections:

- Election Information:** Election Date: Dec-08-2011, Election Type: Special, Description: 11 Example election 2011.
- Left Sidebar:** A list of navigation links including 'Election Details', 'Include Certified Contests', 'Pull Contests', 'Issues & Offices', 'Publish Certified Contests', 'Ballot Styles' (highlighted with a yellow icon), 'Ballot Review', 'Print Labels', 'Official Register', 'Election Expenses', 'Election Results', 'Process Official Register', 'Duplicate Ballot Report', 'Close Election' (highlighted with a yellow icon), and 'Exit'. A 'Refresh Wizard Status' link is at the bottom.
- Styles Section:** A 'Polling Places' dropdown menu and a table with columns 'Style', 'Party', and 'Voters'. The table contains two rows: 'TEST 1' with 1375 voters and 'TEST 2' with 9745 voters.
- Style Details Section:** Fields for 'Style' (TEST 2), 'Color', and 'Party'. A 'Shared Offices Only' checkbox and a 'Save' button are also present.
- Contests Section:** A tabbed interface with 'Contests' and 'Special Considerations' tabs. The 'Contests' tab shows a table with 'District' and 'Item' columns, containing one entry: 'WARD 3' for 'City Council Member Ward 3'.
- Precincts Section:** A tabbed interface with 'Precincts' and 'Splits' tabs. The 'Precincts' tab shows a table with 'Precinct', 'Polling Place', and 'Total' columns. The table lists several precincts and their corresponding polling places: LEWI 3 - LEWISCLK 3 (LEWIS & CLARK SCHOOL), LOWE 1 - LOWELL 1 (LOWELL SCHOOL), PAXS 1 - PAXSON 1 (PAXSON SCHOOL), 63 - PRECINCT 63 (WASHINGTON SCHOOL), and 66 - PRECINCT 66 (ST JOSEPH SCHOOL).
- Bottom Section:** A 'Process Completed' checkbox and a 'Pull Absentees' button. An orange arrow points to the 'Pull Absentees' button.

Ballot Styles – Pull Absentees

Poll Election

- Clicking the Pull Absentees button will only pull voters with Absentee requests on file.

The screenshot shows the 'Election Management' software interface. The top menu bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts Precincts', and 'Reports'. A status bar at the top indicates 'Ballot Style successfully saved.' and provides links for 'Voter Search' and 'Help'.

The main interface is divided into several sections:

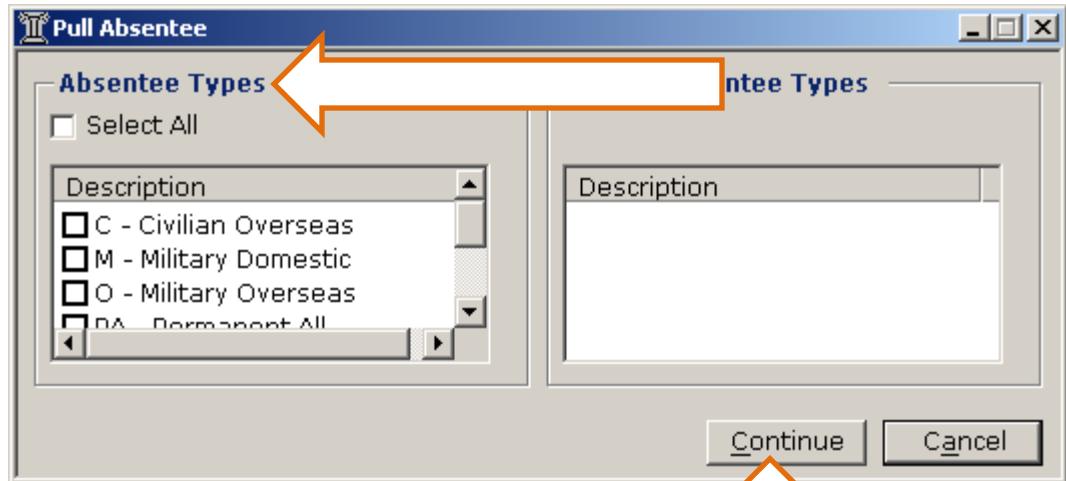
- Election Information:** Election Date: Dec-08-2011, Election Type: Special, Description: 11 Example election 2011.
- Left Sidebar:** A list of navigation links including 'Election Details', 'Include Certified Contests', 'Pull Contests', 'Issues & Offices', 'Publish Certified Contests', 'Ballot Styles' (highlighted with a yellow icon), 'Ballot Review', 'Print Labels', 'Official Register', 'Election Expenses', 'Election Results', 'Process Official Register', 'Duplicate Ballot Report', 'Close Election' (highlighted with a yellow icon), and 'Exit'. A 'Refresh Wizard Status' link is at the bottom.
- Styles Section:** Includes a 'Polling Places' dropdown and a table with columns 'Style', 'Party', and 'Voters'. The table contains two rows: 'TEST 1' with 1375 voters and 'TEST 2' with 9745 voters.
- Style Details Section:** Includes fields for 'Style' (set to 'TEST 2'), 'Color', and 'Party'. There is a 'Shared Offices Only' checkbox and a 'Save' button.
- Contests Section:** Includes a 'Special Considerations' tab and a table with columns 'District' and 'Item'. The table contains one row: 'WARD 3' with 'City Council Member Ward 3'.
- Precincts Section:** Includes a 'Show Voter Count' button and a table with columns 'Precinct', 'Polling Place', and 'Total'. The table contains four rows: 'LEWI 3 - LEWISCLK 3' with 'LEWIS & CLARK SCHOOL', 'LOWE 1 - LOWELL 1' with 'LOWELL SCHOOL', 'PAXS 1 - PAXSON 1' with 'PAXSON SCHOOL', and '63 - PRECINCT 63' with 'WASHINGTON SCHOOL'. A fifth row is partially visible: '66 - PRECINCT 66' with 'ST JOSEPH SCHOOL'.
- Bottom Section:** Includes a 'Process Completed' checkbox and a 'Pull Absentees' button, which is highlighted with a large orange arrow.

Ballot Styles –

Pull Absentees

Poll Election

- A dialogue box will come up, allowing you to specify which absentee types you would like to pull.
- You can pull different types individually or Select All.
- Click **Continue**



Ballot Styles – Pull Absentees

Poll Election

- Absentees will be pulled into the election.
- The following confirmation will display.

The screenshot shows the 'Election Management' application window. The top navigation bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts/Precincts', and 'Reports'. The main header displays 'Election Date: Dec-08-2011', 'Election Type: Special', and 'Description: 11 Test Poll Election 2011'. On the left, a sidebar contains links: 'Election Details', 'Include Certified Contests', 'Pull Contests', 'Issues & Offices', 'Publish Certified Contests', 'Ballot Styles', 'Ballot Review', 'Print Labels', 'Official Register', 'Election Expenses', 'Election Results', 'Process Official Register', 'Duplicate Ballot Report', 'Close Election', and 'Exit'. The central area is divided into 'Styles' and 'Style Details'. The 'Styles' section has a 'Polling Places' dropdown and a table with columns 'Style', 'Party', and 'Voters'. The 'Style Details' section includes fields for 'Style', 'Color', and 'Party', along with a 'Shared Offices Only' checkbox and a 'Save' button. Below these are 'Contests' and 'Special Considerations' tabs. The 'Contests' tab shows a table with 'District' and 'Item' columns, with one entry: 'Seeley Lake Community Co...' for 'Council Board Member'. A modal dialog box titled 'Pulling absentee voters...' is open, showing a progress bar and a 'Cancel' button. An orange arrow points to this dialog. At the bottom, there are buttons for 'Refresh Wizard Status', 'Process Completed', 'Generate Styles', 'Resync Voter', 'View Absentees', and 'Pull Absentees'. A status bar at the very bottom reads: 'Election workspace created successfully. (Please 'Refresh Wizard Status'.)'

Style	Party	Voters
1		1387

Precinct	Polling Place	Total
03 - PRECINCT 03	SEELEY LAKE ELEMENT...	
04 - PRECINCT 04	SEELEY LAKE ELEMENT...	
SEEL 1 - SEELEY 1	SEELEY LAKE ELEMENT...	

- Refresh Wizard Status

- Check Process Completed.

Ballot Styles – Pull Absentees

Vote-By-Mail Election

- Clicking the Pull Absentee button for a vote-by-mail election will pull in all active voters.
- Inactive voters will not be pulled into the mail ballot election.
- Click **Pull Absentees**

The screenshot shows the 'Election Management' software interface. The top navigation bar includes links for Ballot Styles, Address Library, Pull Petitions, Polling Places, CASS, Districts/Precincts, and Reports. The main header displays 'Election Date: Dec-08-2011', 'Election Type: Special', and 'Description: 11 Example election 2011'. On the left, a sidebar lists various election management tasks, with 'Pull Absentees' highlighted. The central area is divided into 'Styles' and 'Style Details' sections. The 'Styles' section contains a table with columns for Style, Party, and Voters, listing 'TEST 1' and 'TEST 2'. The 'Style Details' section includes fields for Style, Color, and Party, along with a 'Save' button. Below this, the 'Contests' section shows a table with District and Item columns, listing 'SEELEY LAKE FIRE' and '1 - Test Fire Issue'. The 'Precincts' section shows a table with Precinct, Polling Place, and Total columns, listing various precincts and their polling places. At the bottom right, a 'Pull Absentees' button is highlighted with a large orange arrow.

Style	Party	Voters
TEST 1		1375
TEST 2		9745

District	Item
SEELEY LAKE FIRE	1 - Test Fire Issue

Precinct	Polling Place	Total
POTO 2 - POTOMAC 2	GREENOUGH POTOMAC...	
03 - PRECINCT 03	SEELEY LAKE ELEMENT...	
04 - PRECINCT 04	SEELEY LAKE ELEMENT...	
05 - PRECINCT 05	SUNSET SCHOOL	
SEEL 1 - SEELEY 1	SEELEY LAKE ELEMENT...	

☐ Process Completed **Pull Absentees**

Ballot Styles – Pull Absentees

Vote-By-Mail Election

- Note that the Pulled Voter count does not match the totals indicated by the ballot styles.
- This is because the ballot styles include all active and inactive voters. Where as only active voters are pulled into the election.

The screenshot displays the 'Election Management' software interface. The top navigation bar includes links for Ballot Styles, Address Library, Pull Petitions, Polling Places, CASS, Districts/Precincts, and Reports. The main window is titled 'Election Date: Dec-08-2011', 'Election Type: Special', and 'Description: 11 Example election 2011'. On the left, a sidebar contains a list of links: Election Details, Include Certified Contests, Pull Contests, Issues & Offices, Publish Certified Contests, Ballot Styles, Ballot Review, Print Labels, Official Register, Election Expenses, Election Results, Process Official Register, Duplicate Ballot Report, Close Election, and Exit. The central area is divided into several sections. The 'Styles' section shows a table with columns for Style, Party, and Voters, containing two rows: TEST 1 (1375) and TEST 2 (9745). An orange arrow points to the 'Voters' column. The 'Style Details' section shows 'Style: TEST 1' and a 'Color' field. The 'Contests' section shows a table with columns for District and Item, containing one row: SEELEY LAKE FIRE (1 - Test Fire Issue). The 'Retrieving voter details for 6381 voters' section shows a progress bar and a 'Cancel' button. The 'Precincts' section shows a table with columns for Precinct, Polling Place, and Total, containing five rows: POTO 2 - POTOMAC 2, 03 - PRECINCT 03, 04 - PRECINCT 04, 05 - PRECINCT 05, and SEEL 1 - SEELEY 1. An orange arrow points to the 'Total' column. The bottom of the window has a 'Process Completed' checkbox and buttons for 'Generate Styles', 'Resync Voter', 'View Absentees', and 'Pull Absentees'.

Style	Party	Voters
TEST 1		1375
TEST 2		9745

District	Item
SEELEY LAKE FIRE	1 - Test Fire Issue

Precinct	Polling Place	Total
POTO 2 - POTOMAC 2	GREENOUGH POTOMAC...	
03 - PRECINCT 03	SEELEY LAKE ELEMENT...	
04 - PRECINCT 04	SEELEY LAKE ELEMENT...	
05 - PRECINCT 05	SUNSET SCHOOL	
SEEL 1 - SEELEY 1	SEELEY LAKE ELEMENT...	

Ballot Styles – Pull Absentees

Vote-By-Mail Election

- A confirmation message will display at the top of the screen.
- Check Process Completed.

Election Management

Ballot Styles Address Library Pull Petitions Polling Places CASS Districts Precincts Reports

Election workspace created successfully. (Please 'Refresh Wizard Status'.)

Voter Search Help

Election Date: Dec-08-2011 Election Type: Special Description: 11 Example election 2011

Styles

Polling Places

Style	Party	Voters
TEST 1		1375
TEST 2		9745

Style Details

Style: TEST 1

Color:

Party:

☐ Shared Offices Only

Save

Contests | Special Considerations

District	Item
SEELEY LAKE FIRE	1 - Test Fire Issue

Precincts | Splits | Show Voter Count

Precinct	Polling Place	Total
POTO 2 - POTOMAC 2	GREENOUGH POTOMAC...	
03 - PRECINCT 03	SEELEY LAKE ELEMENT...	
04 - PRECINCT 04	SEELEY LAKE ELEMENT...	
05 - PRECINCT 05	SUNSET SCHOOL	
SEEL 1 - SEELEY 1	SEELEY LAKE ELEMENT...	

Refresh Wizard Status

☐ Process Completed Resync Voter View Absentees Pull Absentees

- Refresh Wizard Status

Ballot Review

Ballot Review – Overview

- The Ballot Review screen will list all issues and offices that have been setup in the election.
- Only certified Candidates will be displayed.
- After reviewing this screen check Process Completed.

Election Management

Ballot Styles Address Library Pull Petitions Polling Places CASS Districts Precincts Reports

Election workspace created successfully. (Please 'Refresh Wizard Status'.)

Voter Search Help

Election Date: Dec-08-2011 Election Type: Special Description: 11 Example election 2011

Styles

Polling Places

Style	Party	Voters
TEST 1		1375
TEST 2		9745

Style Details

Style: TEST 1

Color:

Party:

☐ Shared Offices Only

Save

Contests | Special Considerations

District	Item
SEELEY LAKE FIRE	1 - Test Fire Issue

Precincts | Splits

Show Voter Count

Precinct	Polling Place	Total
POTO 2 - POTOMAC 2	GREENOUGH POTOMAC...	
03 - PRECINCT 03	SEELEY LAKE ELEMENT...	
04 - PRECINCT 04	SEELEY LAKE ELEMENT...	
05 - PRECINCT 05	SUNSET SCHOOL	
SEEL 1 - SEELEY 1	SEELEY LAKE ELEMENT...	

Refresh Wizard Status

☐ Process Completed

Resync Voter View Absentees Pull Absentees

- Refresh Wizard Status

Print Labels

Overview

- The Print Labels screen functions the same for both Poll and Vote by Mail elections.
- Click **Label Printing** to begin

The screenshot displays the "Election Management" application window. The top menu bar includes options like Ballot Styles, Address Library, Pull Petitions, Polling Places, CASS, Districts Precincts, and Reports. On the right, there are links for Voter Search and Help.

The main header area shows election details: Election Date: Dec-08-2011, Election Type: Special, and Description: 11 Example election 2011.

A left-hand sidebar contains a list of navigation links, each preceded by a green checkmark icon except for "Print Labels" which has a yellow warning icon:

- Election Details
- Include Certified Contests
- Pull Contests
- Issues & Offices
- Publish Certified Contests
- Ballot Styles
- Ballot Review
- Print Labels**
- Official Register
- Election Expenses
- Election Results
- Process Official Register
- Duplicate Ballot Report
- Close Election**
- Exit

The bottom-left corner of the sidebar features a link: Refresh Wizard Status.

The central panel is titled "Mailing Ballot Batches". It displays two status messages:

- 0 Supplemental label(s) waiting to be printed.
- 6380 Main label(s) waiting to be printed.

Below these messages is a large table with three columns: Batch Date, Batch #, and Batch Description. The table body is currently empty.

At the bottom of the window, there is a control bar containing:

- An unchecked checkbox labeled "Process Completed".
- A button labeled "Label Printing".
- A button labeled "Extract Label Information".

A large orange arrow points from the "Label Printing" button towards the center of the page.

Print Labels– Label Printing

- Enter a Batch # and Description.
- The Mailing Date will default to the current system date.
 - This date can be changed and will be the recorded “sent date” that will display for ballots sent in this batch.

The screenshot shows the 'Election Management' application window. The 'Print Labels' option is highlighted in the left-hand navigation menu. The main window displays the 'Print Labels' wizard with the following fields and options:

- Election Date:** Dec-08-2011
- Election Type:** Special
- Description:** 11 Example election 2011
- Batch #:** 1
- Description:** Test 1
- Mailing Date:** 11/28/2011
- Selection Criteria:**
 - Tabbed interface with 'Absentee Types' selected.
 - Checkboxes: Civilian Overseas, Election Specific, Military Domestic, Military Overseas, Permanent All, Permanent Federal, Seasonal.
 - Buttons: Include, Clear.
 - Checkbox: Only Provisional.
 - Buttons: Search, Clear All.
- Output Order:**
 - Field: (dropdown menu)
 - Order By: (dropdown menu)
- Output Type:**
 - Radio buttons: Print Now, Print To File.
 - Select Label: (dropdown menu)
 - Number of Copies: 1
 - Collate: (checked)
- Buttons:** Print, Close.

Print Labels– Label Printing

- Under Selection Criteria you can choose which label types to include in your batch.
- Not selecting anything will include all labels in the batch.
- The Search button will tell you how many labels will be printed.

The screenshot shows the 'Election Management' software interface. The top menu bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts Precincts', and 'Reports'. The main window displays the 'Election Date: Dec-08-2011', 'Election Type: Special', and 'Description: 11 Example election 2011'. On the left sidebar, the 'Print Labels' option is highlighted with a yellow icon and an orange arrow pointing to the 'Selection Criteria' section. The 'Selection Criteria' section has tabs for 'Languages', 'Special Assis Type', and 'Ballot Types'. Under 'Ballot Types', there is a list of checkboxes: 'Civilian Overseas', 'Election Specific', 'Military Domestic', 'Military Overseas', 'Permanent All', 'Permanent Federal', and 'Seasonal'. An orange arrow points to the 'Include' dropdown menu below this list. The 'Output Order' section on the right has three dropdown menus for 'Field' and 'Order By', all set to 'NONE'. The 'Output Type' section has radio buttons for 'Print Now' and 'Print To File', a 'Select Label' dropdown, and a 'Number of Copies' spinner set to 1. A 'Collate' checkbox is checked. At the bottom, there are 'Search' and 'Clear All' buttons, and a 'Refresh Wizard Status' link. The 'Print' and 'Close' buttons are at the bottom right.

Print Labels– Label Printing

- Under Output Order you can specify what sort order you would like your labels to have.
- Output Type allows you to specify print now or to file, and which label type you would like to use.

The screenshot shows the 'Election Management' application window. The top menu bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts/Precincts', and 'Reports'. The main window displays the 'Print Labels' wizard for a 'Special' election on 'Dec-08-2011'. The 'Selection Criteria' section on the left lists various ballot types with checkboxes, and the 'Output Order' section on the right allows specifying the sort order for the labels. The 'Output Type' section at the bottom lets the user choose between 'Print Now' and 'Print To File', and specifies the number of copies and whether to collate. Two orange arrows highlight the 'Print Labels' link in the sidebar and its corresponding sections in the main panel.

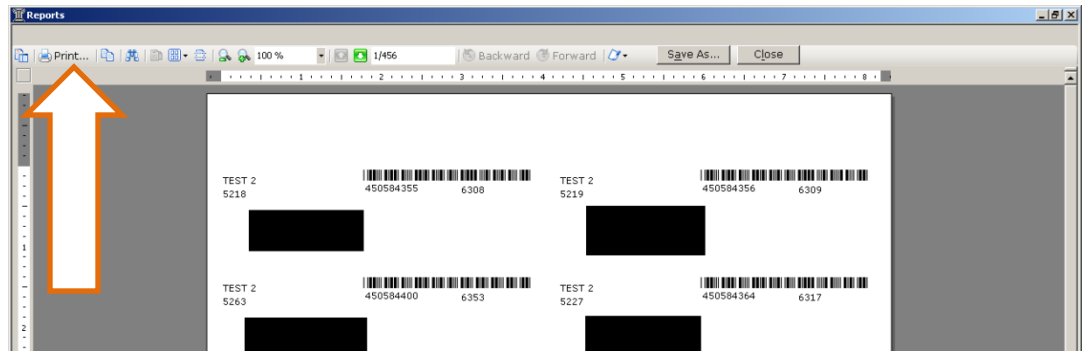
Print Labels– Label Printing

- Specify the number of copies you would like once you have entered Output Order and Type, and you have chosen the label type.
- Click **Print**

The screenshot shows the 'Election Management' software interface. The title bar reads 'Election Management'. Below it, a menu bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts Precincts', and 'Reports'. The main area has a status bar at the top with 'Election Date: Dec-08-2011', 'Election Type: Special', and 'Description: 11 Example election 2011'. Below this, there are input fields for 'Batch # 1', 'Description Test 1', and 'Mailing Date 11/28/2011'. The 'Selection Criteria' section has tabs for 'Languages', 'Special Assis Type', and 'Ballot Types'. Under 'Ballot Types', there is a list of checkboxes: 'Civilian Overseas', 'Election Specific', 'Military Domestic', 'Military Overseas', 'Permanent All', 'Permanent Federal', and 'Seasonal'. An 'Include' dropdown and a 'Clear' button are also present. The 'Output Order' section has three dropdown menus for 'Field' and 'Order By', all set to 'NONE'. The 'Output Type' section has radio buttons for 'Print Now' and 'Print To File', a 'Select Label' dropdown, and a 'Number of Copies' field set to '1' with a 'Collate' checkbox checked. At the bottom right, there are 'Print' and 'Close' buttons. Two orange arrows point to the 'Print' button and the 'Number of Copies' field.

Print Labels– Label Printing

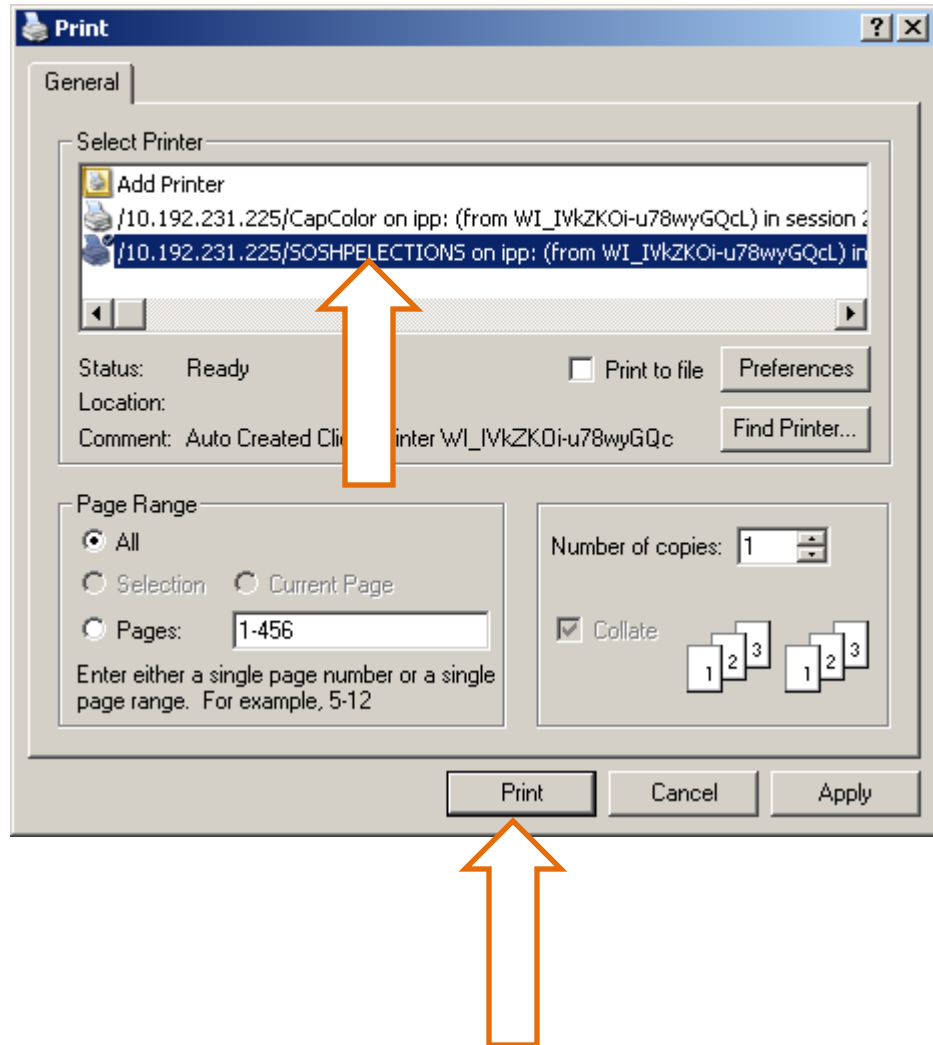
- A report will generate containing your labels.
- Verify that the correct label type was chosen.
- Click **Print**



Print Labels–

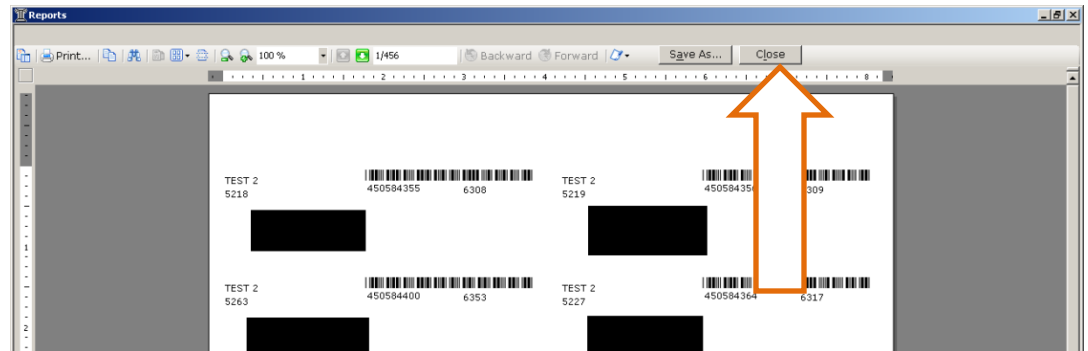
Label Printing

- Choose the printer you would like to print to.
- Click **Print**



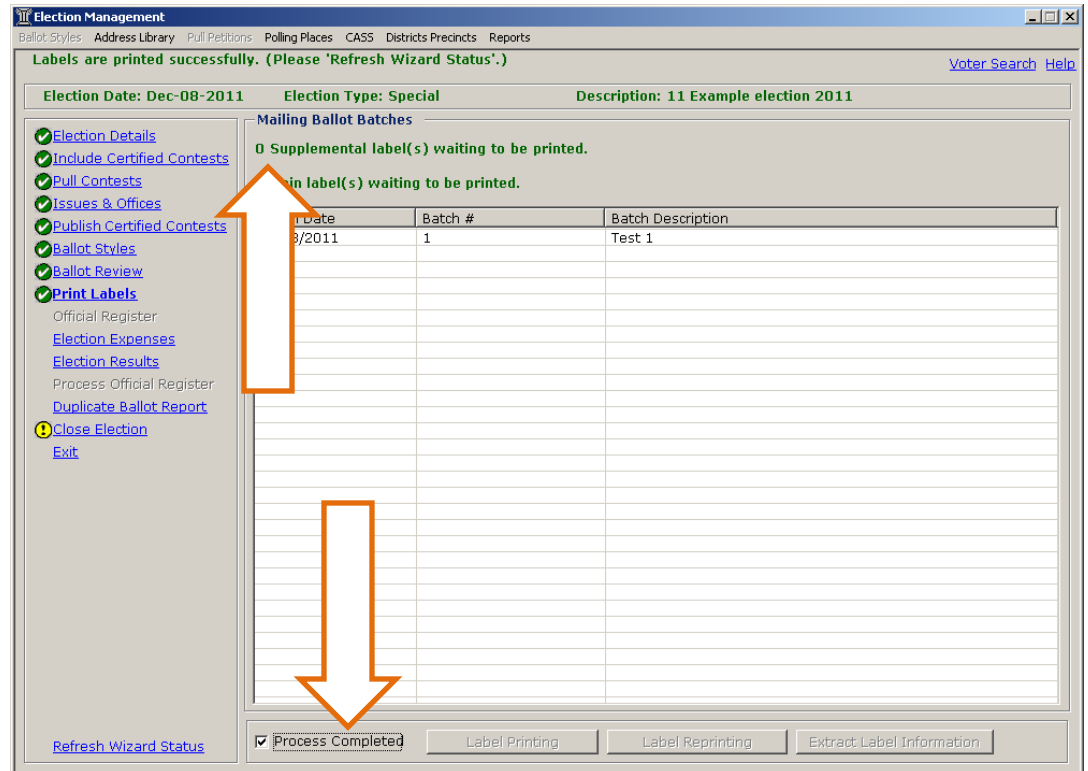
Print Labels– Label Printing

- Once the labels have printed click **Close**.



Print Labels— Overview

- If additional voters are registered after printing labels they will show up as Supplemental labels waiting to be printed.
- Once all labels have been printed and you will have no more check Process completed.



- Refresh Wizard Status

Inactive Electors in a **Vote-by-Mail election**

Inactive Electors–

Overview

If an inactive elector requests a ballot, or mails in, or brings in a voter registration card (or other document listing the elector's current residence address, including but not limited to, a reactivation form) **before** the ballots are mailed, change their status to “Active” and send the person a ballot along with the rest of the mail ballots.

Inactive Electors–

Overview

If an inactive elector requests a ballot, or mails in, or brings in a voter registration card (or other document listing the elector's current residence address, including but not limited to, a reactivation form) after the day on which you mailed your ballots, change their status to “Active” and provide them with a ballot in person or by mail.

You do not need to have them fill out a Replacement/Late Ballot Request since they, by following 13-2-222, MCA, are activating their registration and are therefore automatically eligible for a ballot.

Inactive Electors–

Overview

AFTER Activating the elector -

- The system will ask if you want to resync. Select Yes.
- In Election Management/Print Labels, the label for this voter will be waiting for you to print.

Late and Late Transfer Registrants **in a Vote-by-Mail election**

Late and Late Transfer Registrants

- By law, a late or late transfer registrant must come into your office if the individual wishes to register after the close of regular registration.

Late and Late Transfer

Registrants BEFORE Ballot Mailing

- If a late registrant comes in to register before the ballots are mailed, register them in the system and follow the procedures in 13-19-303, MCA.
- Allow them to vote in your office until noon the day before the ballots are mailed.

Final Steps for Handling Late and Transfer Registrants

- After late or transfer registration has been entered, system will ask if you want to resync. Select yes.
- Then go to **Print Labels in Election Management**, choose, and the system will display how many labels will be waiting to be printed for this election.

Required form

For
Replacement/Late
Ballot Request for
Mail Ballot Election.

Check the Secretary
of State's website for
this form.

REPLACEMENT/LATE BALLOT REQUEST FOR MAIL BALLOT ELECTION 44.9.305, ARM, and 13-19-305, MCA

I, _____, do hereby request a replacement or late ballot for the mail ballot election to be held _____, 20____, in _____ County, Montana, for the following reason (check one):

- ☐ I did not receive the ballot mailed to me.
- ☐ The ballot mailed to me has been:
- ☐ spoiled ☐ damaged
- ☐ lost ☐ destroyed
- ☐ I am a late or late transfer registrant who is registering after ballots have been mailed, and who has not received a ballot for the election referenced above.

Note to election administrator: An inactive elector who is reactivating under 13-2-222, MCA, by requesting a ballot, or by mailing or bringing in a voter registration card (or other document listing the elector's current residence address in your county, including but not limited to a reactivation form) does not need to fill out this form in order to receive a ballot, since by reactivating, the elector is automatically eligible for a ballot.

I hereby certify, under penalty of law, that the above information is true and correct, and that I understand attempting to vote more than once in any election is a violation of Montana election law.

Individual must sign and acknowledge below in the presence of a Notary Public or in the presence of the Election Administrator or deputy if delivered in person.

Signature of elector: _____

Address of elector: _____

STATE OF MONTANA)
County of _____)

On this _____ day of _____, 20____, before me, personally appeared the above named individual, known to me or proved to me to be the person whose name is subscribed to the above declaration, and acknowledged to me that he/she executed the same.

SEAL

Notary Public for the State of Montana

Printed Name of Notary Public

Residing at

My Commission Expires _____, 20____

By:

Deputy (if not notarized)

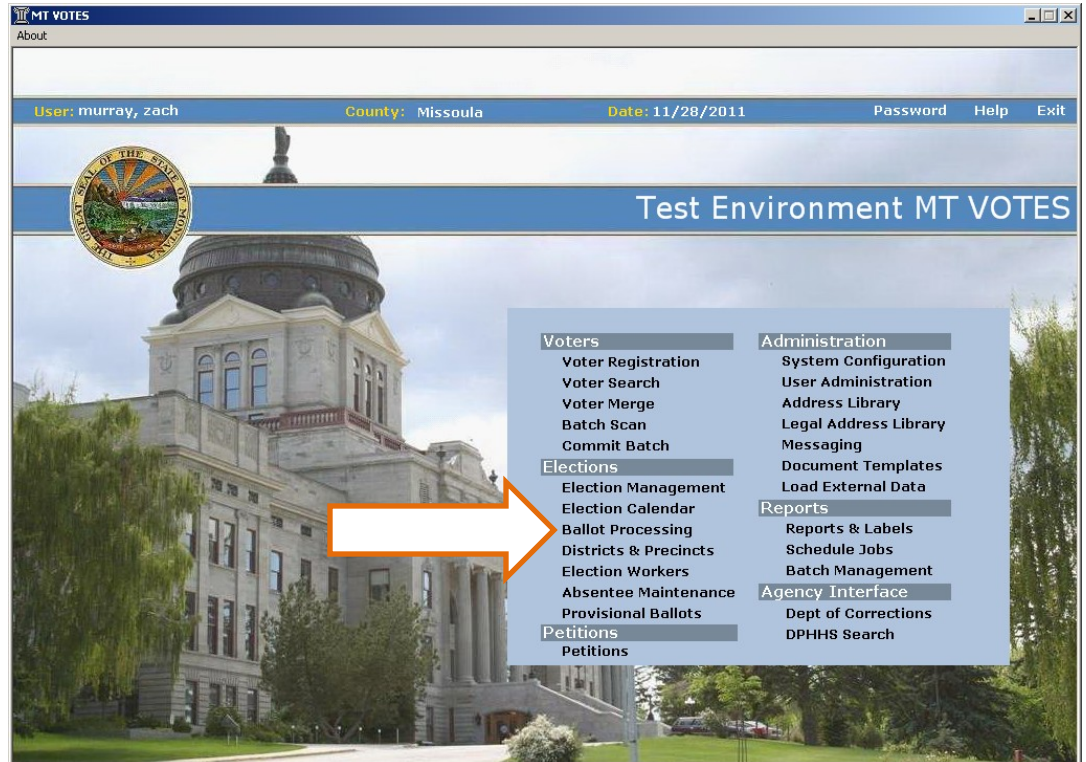
Do not extend address ranges after you have printed labels. Duplicate ballots will be prepared for all electors in that address range!

If you have a new address you create a NEW address range for that one address until election is closed.

Ballot Processing

Ballot Processing– Overview

- The Ballot Processing screen will allow you to process Absentee and Vote-By-Mail ballots.
- Click Ballot Processing to begin.



Overview

- Ensure the correct Batch and Received Dates are showing.
- Enter in a Batch Description and Identifier.

[illegible]

Creating a Ballot Batch

- Click in the ID Field.

[illegible]

Ballot Processing–

Process Ballots

- Once all ballots have been entered select an entry to:
 - View Ballot Details
 - Delete
 - View Voter Details
 - View Household Info
 - View Active Ballots
- Click **Close** when you have finished examining each entry.

The screenshot shows the 'Process Ballot' window. At the top, there's a 'Batch' section with fields for Election (12/08/2011 11 Example election 2011), Batch Date (11/28/2011), Received Date (11/28/2011), Batch Description, and Identifier. Below this is a 'Ballot Label' section with ID, Source (Mail), and an 'Add' button. To the right is a 'Ballot Search in Workspace' section with Name, Street, City, and a 'Search' button. The main area is a 'List of Ballots in the Batch' table with columns: Item #, Barcode, Voter Name, and Source. The table contains 7 entries. At the bottom, there are buttons for 'Details', 'Delete', 'Voter Details', 'Household', 'View Ballots', and 'Close'. Orange arrows point to each of these buttons. A large orange arrow also points from the 'View Ballots' button area towards the 'Close' button.

Item #	Barcode	Voter Name	Source
1	450584356	BATHGATE, LORIS L	Mail
2	450584364	BERRY, ZONDA K	Mail
3	450584377	BISBEE, WENDY L	Mail
4	450584379	BLODGETT, JUSTIN R	Mail
5	450584407	BROWN, LAURETTA F	Mail
6	450584378	BRUNNER, TRAVIS	Mail
7	450584411	CHAUSSEE, ELLEN O	Mail

Verify Ballots

- [illegible]

Ballot Processing– Verify Ballots

- Verify the displayed signature and enter a Ballot Status.
- Click Save and move to Next record to be Processed to continue.
- Repeat this process until you have verified all signatures.

Verify Signature

[Help](#)

Batch

Election: 12/08/2011 11 Example election 2011 Batch Description:
Batch Date: 11/28/2011 Received Date: 11/28/2011 Identifier:

Ballot Label

ID: Add
Source: Mail

Ballot Search in Workspace

Name:
Street: City: Search

Batch Navigation

Name: Search Record No: Search
Save and Move to Next record to be Processed Exceptions
First Previous Next Last Item 1 Of 7

Ballot Details

Ballot: 11/28/2011
Received Date:
Voter Name:
Address:
Ballot Status: Accepted
Comments:
Registration:
Attestation on File:
Full Image Show Signature

Exceptions **Ballot** **nt**

Sent Seq.	Ballot	VoterName	Source	Date Sent	Date Received	Ballot Style	Ballot Type
1	450	6					

Delete Voter Details Household View Ballots Close

Overview

- The completed batch will now be listed with no unprocessed ballots.
- Repeat the previous steps to process additional ballot batches.

[illegible]

Undeliverable Ballots

Undeliverable Ballots

- Montana mail ballot law requires notifying the elector whose ballot was returned as undeliverable be sent an NVRA notice which can be forwarded, with prepaid postage. See [13-19-313 \(4\), MCA.](#)

Undeliverable Ballots

- Click New to create a new batch of undeliverable ballots.

[illegible]

Ballot Processing– Undeliverable Ballots

- Click in the ID field and either scan a ballots barcode or manually enter the ballot ID and click **Add**.

The screenshot shows the 'Undeliverable Ballots' application window. The 'Batch' section contains fields for 'Election' (12/08/2011 11 Example election 2011), 'Batch Date' (11/28/2011), 'Received Date' (11/28/2011), 'Batch Description', and 'Identifier'. The 'Ballot Label' section has an 'ID' field, an 'Add' button, and a 'Ballot Search' section with a search bar and a 'Search' button. The 'Voter Details' section includes fields for 'Name on Ballot', 'Status' (Active), 'Name in Record', 'Status', 'Ballot Residential Address', 'Current Residential Address', 'Ballot Mail Address', 'Address Type', and 'Current Mail Address'. At the bottom are buttons for 'Delete', 'First', 'Previous', 'Next', 'Last', 'View Ballots', 'Voter Details', 'Save', and 'Close'. An orange arrow points to the 'Add' button in the 'Ballot Label' section.

Ballot Processing– Undeliverable Ballots

- Click in the ID field and either scan a ballots barcode or manually enter the ballot ID and click **Add**.

The screenshot shows the 'Undeliverable Ballots' application window. The 'Batch' section contains fields for 'Election' (12/08/2011 11 Example election 2011), 'Batch Date' (11/28/2011), 'Received Date' (11/28/2011), 'Batch Description', and 'Identifier'. The 'Ballot Label' section has an 'ID' field, an 'Add' button, and a 'Ballot Search' section with a search bar and a 'Search' button. The 'Voter Details' section includes fields for 'Name on Ballot', 'Name in Record', 'Status' (Active), 'Ballot Residential Address', 'Current Residential Address', 'Ballot Mail Address', and 'Current Mail Address'. At the bottom are buttons for 'Delete', 'First', 'Previous', 'Next', 'Last', 'View Ballots', 'Voter Details', 'Save', and 'Close'. An orange arrow points to the 'Add' button in the 'Ballot Label' section.

Ballot Processing– Undeliverable Ballots

- The Voter Details will display.
- Review displayed information.
- Click **Save** to store the undeliverable ballot record.

Undeliverable Ballots

Ballot has been received. [Help](#)

Batch

Election: 12/08/2011 11 Example election 2011 Batch Description:

Batch Date: 11/28/2011 Received Date: 11/28/2011 Identifier:

Ballot Label

ID:

Ballot Search

Name: Street: City:

Voter Details

Name on Ballot: [REDACTED]	Name in Record: B. HENRYSON
Status: Active	Status: Active
Ballot Residential Address: [REDACTED] MISSOULA, MT 59801	Current Residential Address: [REDACTED] MISSOULA, MT 59801
Ballot Mail Address: [REDACTED] MISSOULA, MT 59801	Current Mail Address: <input type="text"/>
Address Type: Mailing	

☐ Inactivate ☐ Review Registration

Undeliverable Ballots

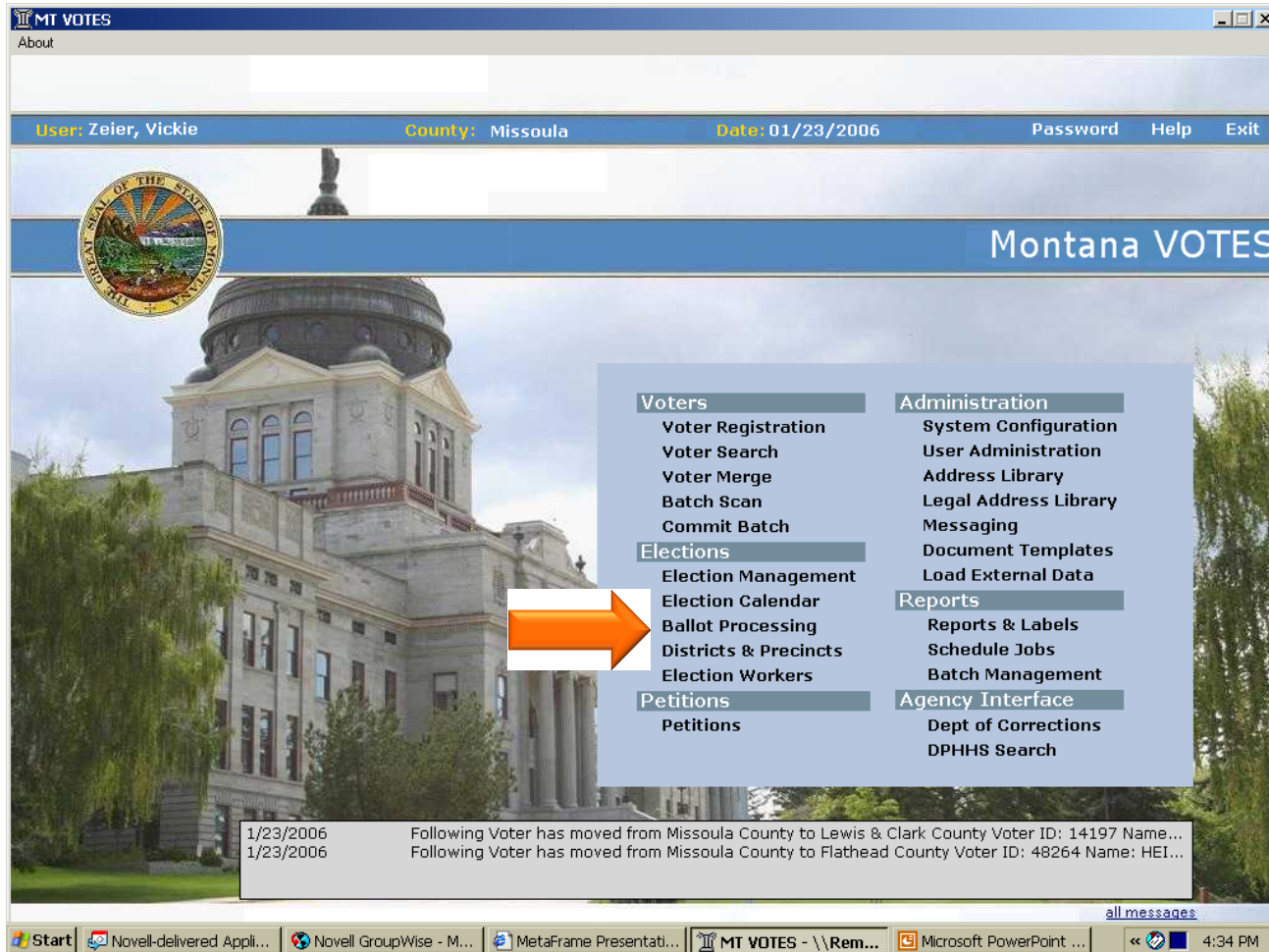
- The new undeliverable ballot batch will be displayed.
- Follow the previous steps to add in additional undeliverable ballots.
- Close Ballot Processing when finished.

[illegible]

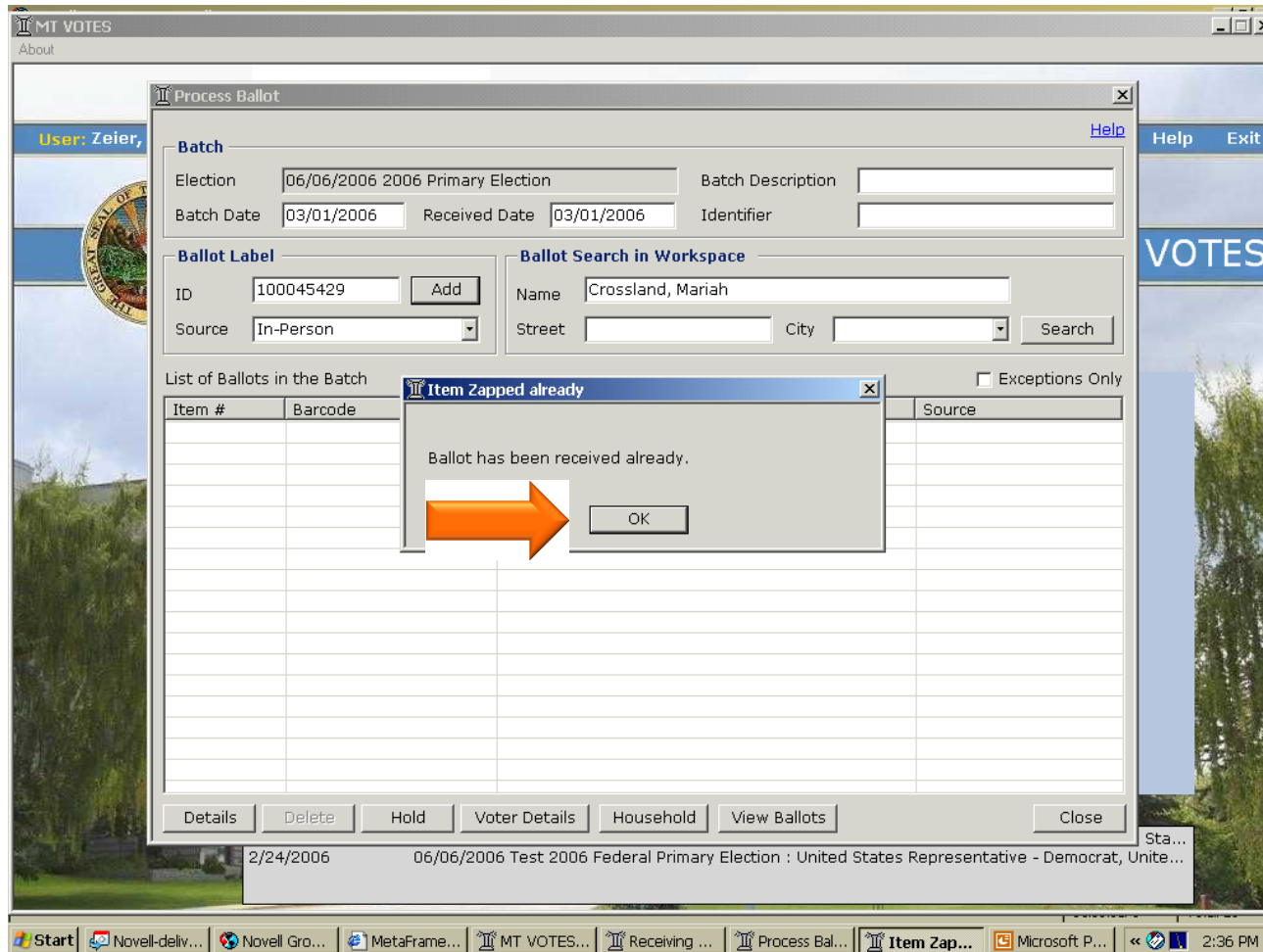
Releasing Undeliverable Ballots

- Sometimes a ballot comes back undeliverable and a real person shows up in the office
- Then the ballot must be released

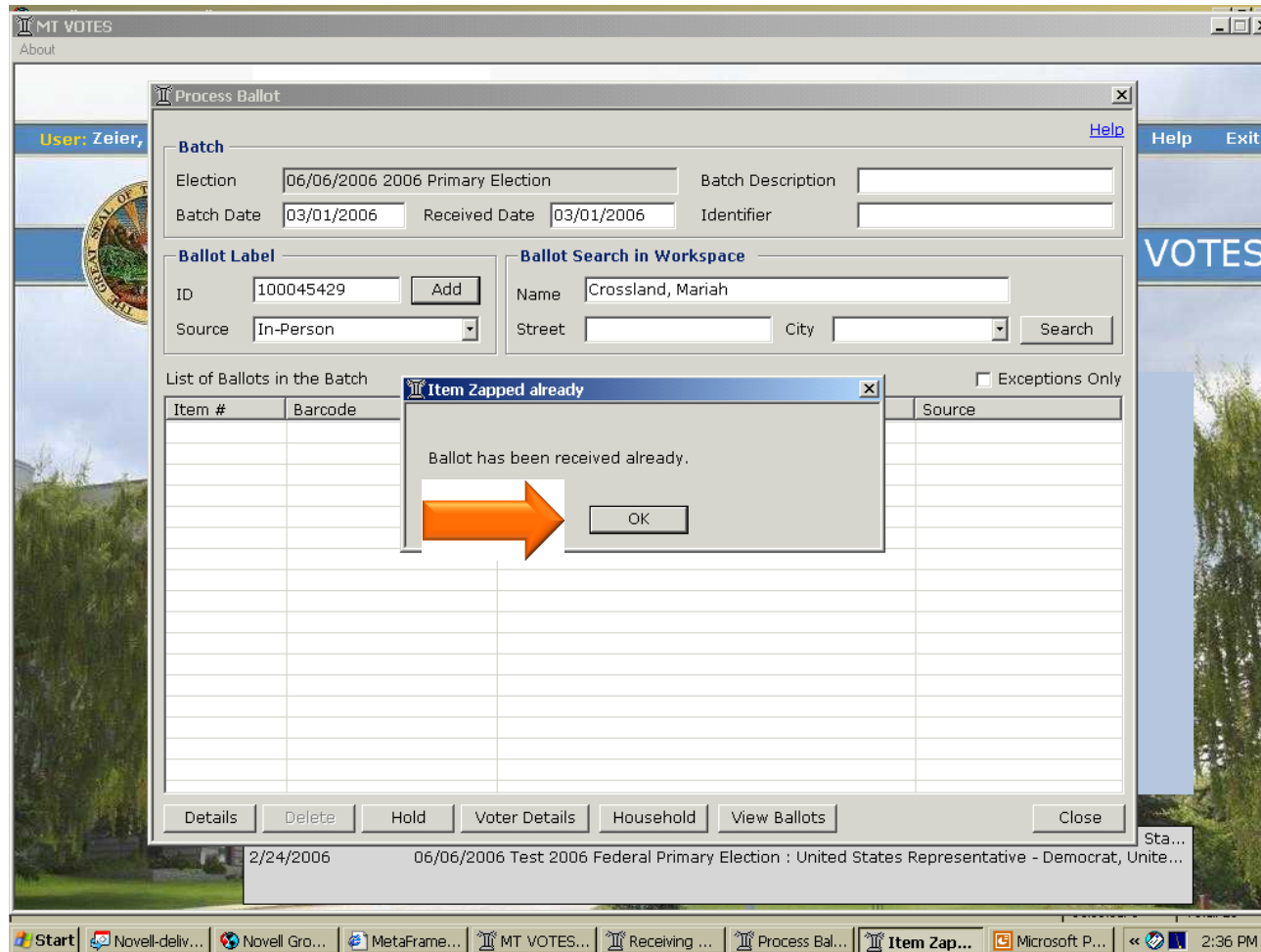
Click Ballot Processing



You will receive this message: Ballot has been received already



Click OK and you will be taken to the Receiving Ballot Batches screen



[illegible]

The screenshot shows the 'Receiving Ballot Batches' window in the MT VOTES application. The window title is 'Receiving Ballot Batches'. Below the title bar, there is a status message: 'Query executed successfully.' and links for 'Voter Search' and 'Help'. The 'Search' section includes a dropdown menu for 'Election' set to '06/06/2006 2006 Primary Election', and input fields for 'Batch Date From' and 'Batch Date To'. There are 'Search' and 'Clear' buttons. Below the search section, there are tabs for 'Ballot' and 'Undeliverable', with 'Ballot' being the active tab. A table displays the search results:

Batch #	Batch Description	Batch Date	Receive Date
5		03/01/2006	03/01/2006

An orange arrow points to the 'Batch # 5' cell. Below the table, there are 'Process' and 'Delete' buttons. At the bottom right of the window, there are 'View Held Ballots' and 'Close' buttons. The status bar at the bottom of the application shows the date '2/24/2006' and the election name '06/06/2006 Test 2006 Federal Primary Election : United States Representative - Democrat, Unite...'. The taskbar at the bottom shows the Start button and several open applications: Novell-delivered..., Novell GroupWise..., MetaFrame Prese..., MT VOTES - \\Re..., Receiving Ballo..., and Microsoft PowerP...

Delete the voter from the Undeliverable Ballots so the ballot can be processed

MT VOTES
About

User: Zeier,

Undeliverable Ballots

Record 1 of 1

Batch

Election: 2006 Primary Election Batch Description:
Batch Date: 03/01/2006 Received Date: 03/01/2006 Identifier:
[Help](#) [Help](#) [Exit](#)

Ballot Label

ID: [Add](#)

Ballot Search

Name:
Street: City: [Search](#)

Voter Details

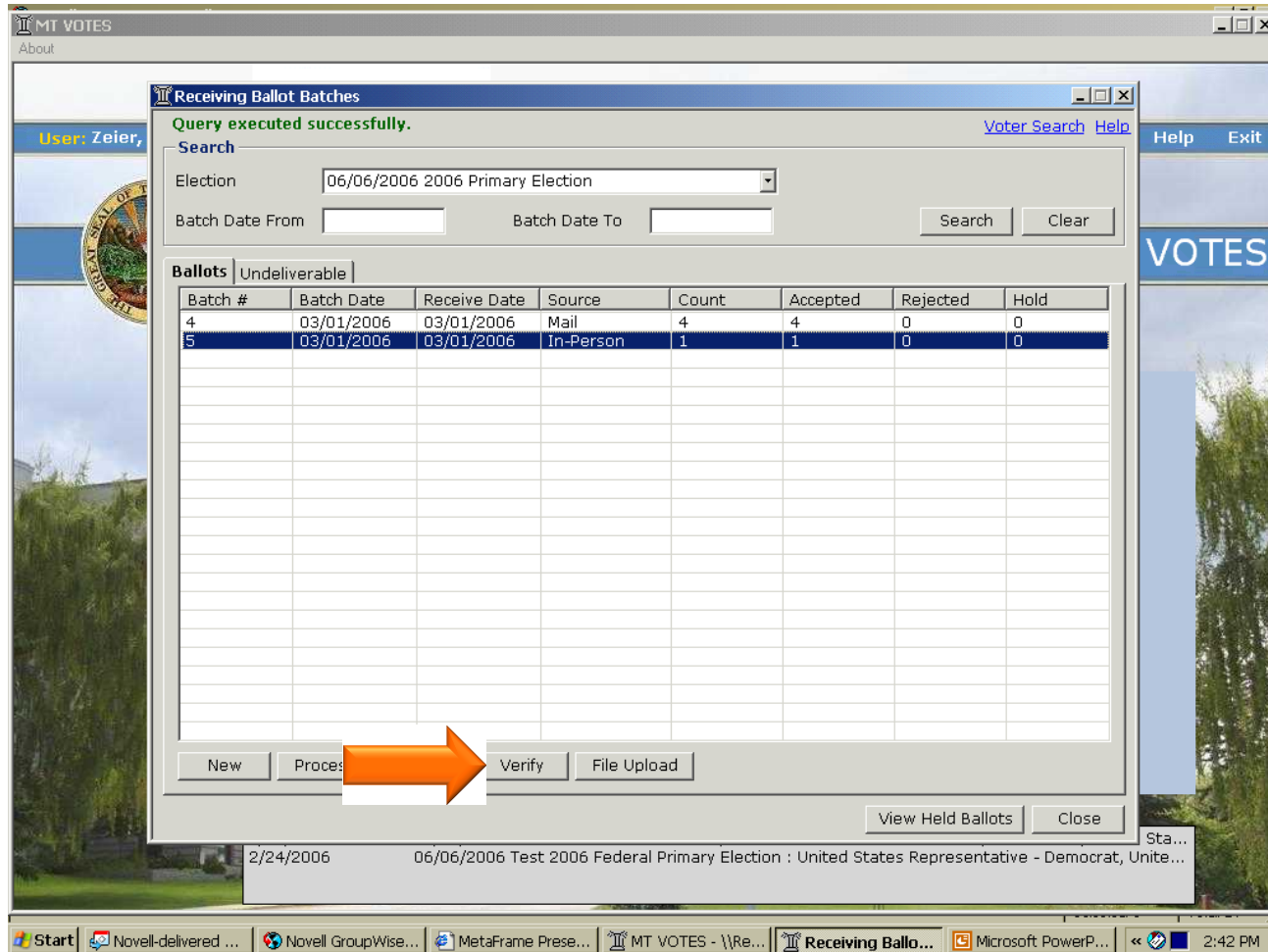
Name on Ballot: CROSSLAND, MARIAH J Name in Record: CROSSLAND, MARIAH J
Status: Active Status: Active
Ballot Residential Address: 920 TAYLOR ST MISSOULA, MT 59802
Current Residential Address: 920 TAYLOR ST MISSOULA, MT 59802
Ballot Mail Address: PRSC MCMURDO STATION PSC 469 BOX 700 APO, AP 96599
Address Type: Civilian Overseas
Current Mail Address: BOX 7146 MISSOULA, MT 59807
☐ Inactivate ☐ Review Registration [Change Now](#)

[Delete](#) [First](#) [Previous](#) [Next](#) [Last](#) [View Ballots](#) [Voter Details](#) [Save](#) [Close](#)

2/24/2006 06/06/2006 Test 2006 Federal Primary Election : United States Representative - Democrat, Unite... Sta...

Start Novell-deliver... Novell Group... MetaFrame Pr... MT VOTES - ... Receiving Ball... Undeliverabl... Microsoft Pow... 2:39 PM

Verify and save. Then the ballot will be listed as Accepted

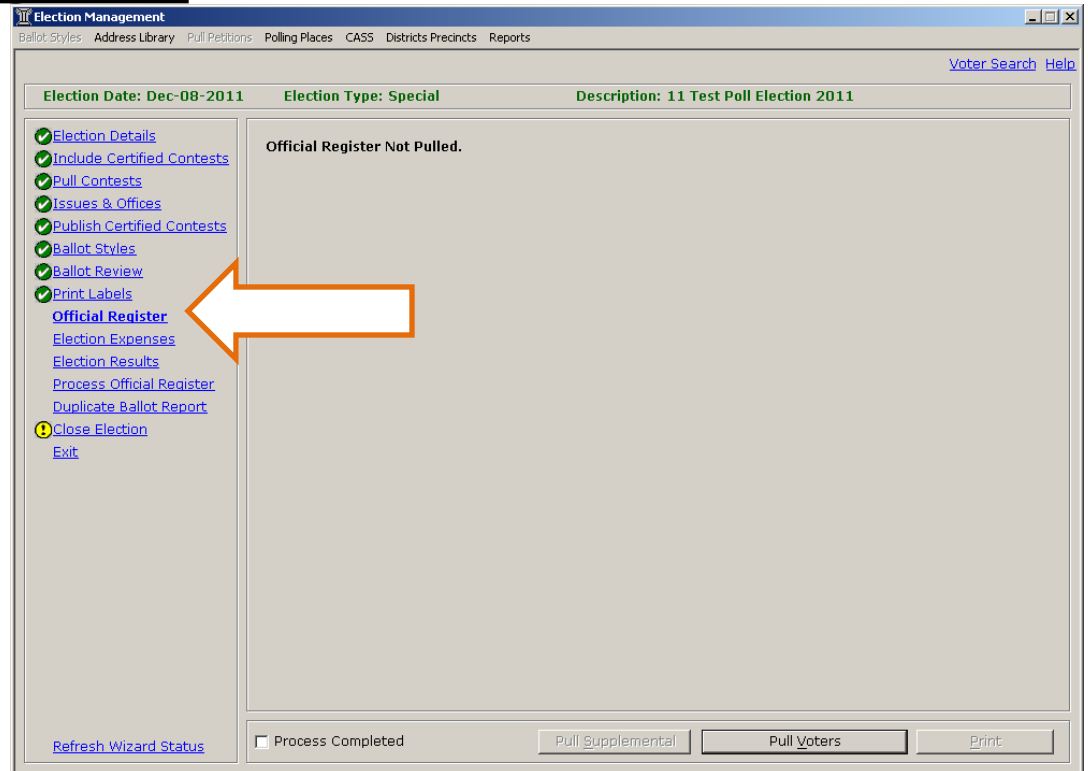


Official Register

Official Register–

Generate Official Register

- The Official Register is only available for Poll elections.
- Click **Pull Voters** to begin.



Official Register–

Generate Official Register

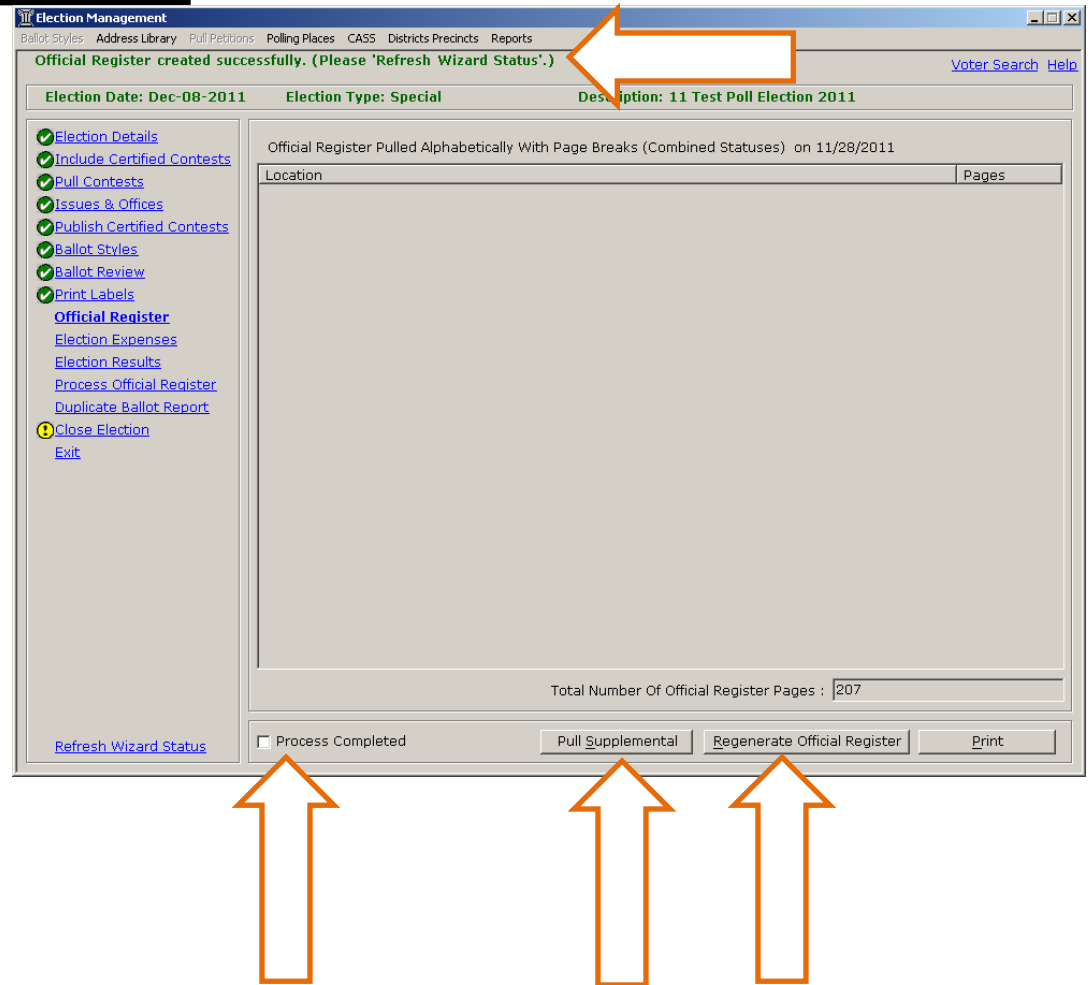
- The Generate Official Register screen will appear.
- Choose which sort order options you would like and click **OK**.

A screenshot of the 'Generate Official Register' dialog box. The dialog box has a title bar with the text 'Generate Official Register' and standard window controls. A 'Help' link is in the top right corner. The main area contains three radio button options: 'Alphabetically', 'By Polling Place', and 'By Precinct'. Under 'Alphabetically' are two checkboxes: 'Break Pages Alphabetically' and 'Precincts within Polling Place'. Under 'By Polling Place' are two checkboxes: 'Wards Within Precinct' and 'Ballot Styles within Polling Place'. Under 'By Precinct' is one checkbox: 'Break Pages Alphabetically'. Below these is a section with three radio button options: 'All' (selected), 'Supplemental Addition', and 'Supplemental Deletion'. At the bottom are 'Ok' and 'Cancel' buttons. An orange arrow points from the 'Ok' button back to the text 'Generate Official Register' in the list.

Official Register–

Generate Official Register

- A confirmation message will display.
- The register can be regenerated or you can pull a supplemental register by clicking the buttons below.
- Once the register has been printed check Process Completed.



Election Expenses

Election Expenses— Overview

- The Election Expense screen can be used to track expenses for your election.
- This screen is not required to close your election.
- Click Process Completed when you are finished with this screen.

Election Management
Ballot Styles | Address Library | Pull Petitions | Polling Places | CASS | Districts Precincts | Reports

[Voter Search](#) [Help](#)

Election Date: Dec-08-2011 Election Type: Special Description: 11 Test Poll Election 2011

[Election Details](#)
[Include Certified Contests](#)
[Pull Contests](#)
[Issues & Offices](#)
[Publish Certified Contests](#)
[Ballot Styles](#)
[Ballot Review](#)
[Print Labels](#)
[Official Register](#)
[Election Expenses](#)
[Election Results](#)
[Process Official Register](#)
[Duplicate Ballot Report](#)
[Close Election](#)
[Exit](#)

[Refresh Wizard Status](#)

Election Expenses | District Cost Distribution | Election Districts | Remaining :

Printing

Expense Item	Actual Cost	Actual 5%
Ballots	\$0.00	\$0
Punchcards	\$0.00	\$0
Master List	\$0.00	\$0
Inserts	\$0.00	\$0
Letters	\$0.00	\$0
Acceptance of Office	\$0.00	\$0
Poster/Signs	\$0.00	\$0
Certificate of Notification	\$0.00	\$0
Certificate of Election	\$0.00	\$0
Challenge Forms	\$0.00	\$0
Replacement Ballot Form	\$0.00	\$0
Voter's Pamphlet	\$0.00	\$0
VBM - Mailer Envelope	\$0.00	\$0
VBM - Return Envelope	\$0.00	\$0
VBM - Secrecy Envelope	\$0.00	\$0
Materials for Election Personnel Trainin	\$0.00	\$0
Other	\$0.00	\$0
Close of Registration	\$0.00	\$0
Notice of Election	\$0.00	\$0
Notice of Filing for Office	\$0.00	\$0
Notice-Absentee Ballots Available	\$0.00	\$0
Display Ad	\$0.00	\$0

Group Total: \$0.00 Actual Total: \$0.00 [Calculate Totals](#)

☐ Process Completed Expense Group : 1/9 [Save](#) [Previous](#) [Next](#)

Election Results

Election Results– Overview

- Election results can be manually entered into this screen.
- Using this screen will store this information in MT Votes for future reference.
- This screen is not required to close your election.
- Click process complete once results have been entered.

The screenshot shows the 'Election Management' application window. The title bar includes 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts Precincts', and 'Reports'. The main header displays 'Election Date: Dec-08-2011', 'Election Type: Special', and 'Description: 11 Test Poll Election 2011'. The left sidebar contains a list of links: 'Election Details', 'Include Certified Contests', 'Pull Contests', 'Issues & Offices', 'Publish Certified Contests', 'Ballot Styles', 'Ballot Review', 'Print Labels', 'Official Register', 'Election Expenses', 'Election Results', 'Process Official Register', 'Duplicate Ballot Report', 'Close Election', and 'Exit'. The main area is divided into 'Issues Results' and 'Offices Results' tabs. The 'Offices Results' tab is active, showing a table with columns 'Offices', 'Winner', and 'Votes Received'. The first row shows 'Council Board Member' as the office, 'PELLETIER, GARY J' as the winner, and '1' as the votes received. At the bottom of the window, there is a checkbox labeled 'Process Completed' and a 'Save' button. An orange arrow points to the 'Process Completed' checkbox.

Offices	Winner	Votes Received
Council Board Member	PELLETIER, GARY J	1

Process Official Register

Process Official Register– Overview

- Accepted ballots can be indicated manually by checking the box next to each voters name.
- To use the barcode scanner click in the barcode field and scan the corresponding barcode for a voter on that page.

Election Management

Ballot Styles Address Library Pull Petitions Polling Places CASS Districts Precincts Reports

You are on the first page. [Voter Search](#) [Help](#)

Election Date: Dec-08-2011 Election Type: Special Description: 11 Test Poll Election 2011

☒ Election Details
☒ Include Certified Contests
☒ Pull Contests
☒ Issues & Offices
☒ Ballot Review
☒ Print Labels
☒ Official Register
☒ Election Expenses
☒ Election Results
[Process Official Register](#)
[Duplicate Ballot Report](#)
[Close Election](#)
[Exit](#)

Refresh Wizard Status

Official Register: [Official Register](#) Alphabet: [Alphabet](#) Barcode: Accept: Go To:

Page No: 1

Accepted	Voter Name	Residential Address	Absentee Sent/Recd Date
<input type="checkbox"/>		237 CUTTHROAT DR SEELEY LAKE, MT 5986	
<input type="checkbox"/>		665 SPRUCE DR SEELEY LAKE, MT 59868	
<input type="checkbox"/>		665 SPRUCE DR SEELEY LAKE, MT 59868	
<input type="checkbox"/>		2820 HWY 83 N SEELEY LAKE, MT 59868	
<input type="checkbox"/>		260 EAGLE DR SEELEY LAKE, MT 59868	
<input type="checkbox"/>		260 EAGLE DR SEELEY LAKE, MT 59868	
<input type="checkbox"/>		120 LAUREL LN SEELEY LAKE, MT 59868	11/28/2011

Print Processed Voters Add Omitted Voters First Prev Next Last Page 1 of 207

☐ Process Completed

Process Official Register– Overview

- You can only scan barcodes for the page you are on.
- Click next to go to the next page and begin scanning barcodes again.

Election Management

Ballot Styles Address Library Pull Petitions Polling Places CASS Districts Precincts Reports

You are on the first page. [Voter Search](#) [Help](#)

Election Date: Dec-08-2011 Election Type: Special Description: 11 Test Poll Election 2011

Official Register: **Official Register** Alphabet: Barcode: Accept:

Page No: 1 Go To:

Accepted	Voter Name	Residential Address	Absentee Sent/Recd Date
<input type="checkbox"/>		237 CUTTHROAT DR SEELEY LAKE, MT 5986	
<input type="checkbox"/>		665 SPRUCE DR SEELEY LAKE, MT 59868	
<input type="checkbox"/>		665 SPRUCE DR SEELEY LAKE, MT 59868	
<input type="checkbox"/>		2820 HWY 83 N SEELEY LAKE, MT 59868	
<input type="checkbox"/>		260 EAGLE DR SEELEY LAKE, MT 59868	
<input type="checkbox"/>		260 EAGLE DR SEELEY LAKE, MT 59868	
<input type="checkbox"/>		120 LAUREL LN SEELEY LAKE, MT 59868	11/28/2011

[Refresh Wizard Status](#)

Print Processed Voters Add Om Next Last Page 1 of 207

☐ Process Completed

Process Official Register– Overview

- Once you have finished Processing the official register you can print a list of processed voters.
- Clicking Add Omitted Voters will allow you to add in voters missing from the official register.

Election Management

Ballot Styles Address Library Pull Petitions Polling Places CASS Districts Precincts Reports

You are on the first page. [Voter Search](#) [Help](#)

Election Date: Dec-08-2011 Election Type: Special Description: 11 Test Poll Election 2011

Official Register: **Official Register** Alphabetic List: **Not Applicable** Barcode: Accept:

Page No: **1** Go To:

Accepted	Voter Name	Residential Address	Absentee Sent/Recd Date
<input type="checkbox"/>		237 CUTTHROAT DR SEELEY LAKE, MT 5986	
<input type="checkbox"/>		665 SPRUCE DR SEELEY LAKE, MT 59868	
<input type="checkbox"/>		665 SPRUCE DR SEELEY LAKE, MT 59868	
<input type="checkbox"/>		2820 HWY 83 N SEELEY LAKE, MT 59868	
<input type="checkbox"/>		260 EAGLE DR SEELEY LAKE, MT 59868	
<input type="checkbox"/>		260 EAGLE DR SEELEY LAKE, MT 59868	
<input type="checkbox"/>		120 LAUREL LN SEELEY LAKE, MT 59868	11/28/2011

[Refresh Wizard Status](#)

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☐ Process Deleted

Process Official Register– Overview

- Check Process Completed.
- Refresh Wizard Status

Election Management

Ballot Styles Address Library Pull Petitions Polling Places CASS Districts Precincts Reports

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Election Date: Dec-08-2011 Election Type: Special Description: 11 Test Poll Election 2011

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[Refresh Wizard Status](#)

Print Processed Voters Add Omitted Voters First Prev Next Last Page 1 of 207

☐ Process Completed

Duplicate Ballot Report

Purpose of the Duplicate Ballot Report

- Determine whether any voters intentionally voted more than once.
- After you review the voter record and ballot information for each voter, mark those voters believed to exhibit fraudulent behavior.
- Generate a report to send to the County Attorney for further investigation.

Duplicate Ballot Report– Overview

- This screen will list any voters that have received an additional ballot for any reason.
- This includes re-issued or replacement ballots.
- Once you have reviewed this screen check Process Completed.

The screenshot shows the 'Election Management' software interface. The title bar reads 'Election Management'. Below it is a menu bar with options: 'Ballot Styles', 'Address Library', 'Pull Petitions', 'Polling Places', 'CASS', 'Districts/Precincts', and 'Reports'. On the right of the menu bar are links for 'Voter Search' and 'Help'. The main header area displays 'Election Date: Dec-08-2011', 'Election Type: Special', and 'Description: 11 Test Poll Election 2011'. On the left is a vertical menu with the following items: 'Election Details' (checked), 'Include Certified Contests' (checked), 'Pull Contests' (checked), 'Issues & Offices' (checked), 'Publish Certified Contests' (checked), 'Ballot Styles' (checked), 'Ballot Review' (checked), 'Print Labels' (checked), 'Official Register' (checked), 'Election Expenses' (checked), 'Election Results' (checked), 'Process Official Register' (checked), 'Duplicate Ballot Report' (highlighted in blue), 'Close Election' (with a warning icon), and 'Exit'. The main area contains a table with three columns: 'Voter Name', 'Current Residential Address', and 'No of Ballots'. The table is currently empty. At the bottom left is a 'Refresh Wizard Status' link. At the bottom center is a checkbox labeled 'Process Completed', which is currently unchecked. To the right of the checkbox are five buttons: 'Report...', 'Voter Reg', 'View Ballots', 'Select All', and 'Save'. A large orange arrow points from the bottom of the screen up to the 'Process Completed' checkbox.

Close Election

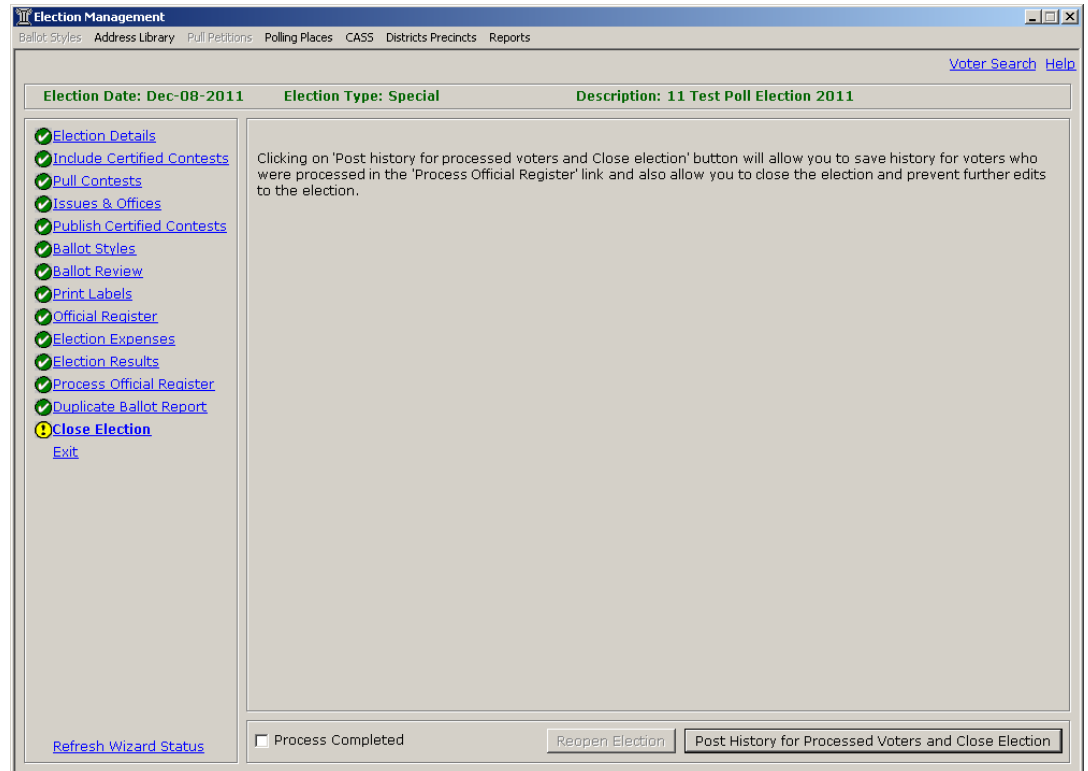
Requirements to Close and Election

An election can only be closed once the following has been done:

- All ballot labels have been printed
- Mail and Absentee Ballots have been processed
- Provisional Ballots have been processed
- The Official Register has been processed

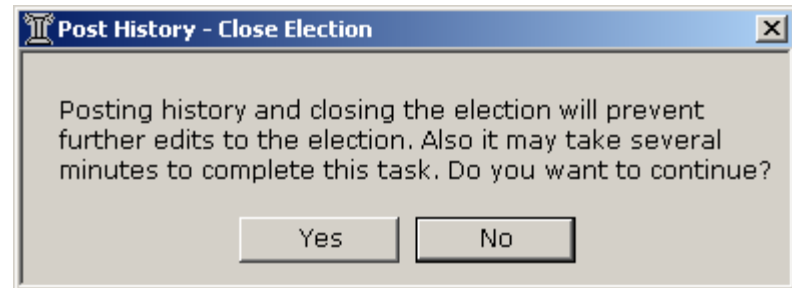
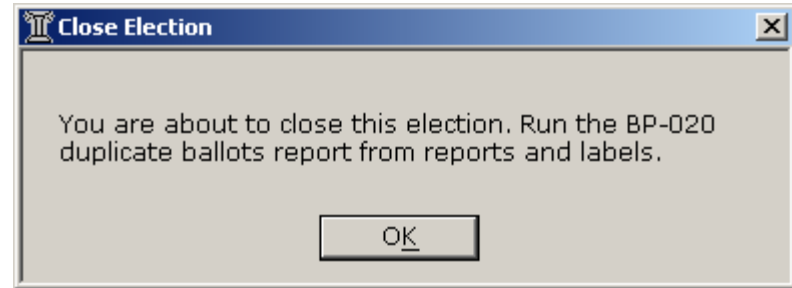
Close Election– Overview

- This screen will allow you to close an open election or re-open a closed election.
- Click the Post History for Processed Voters and Close Election to continue.



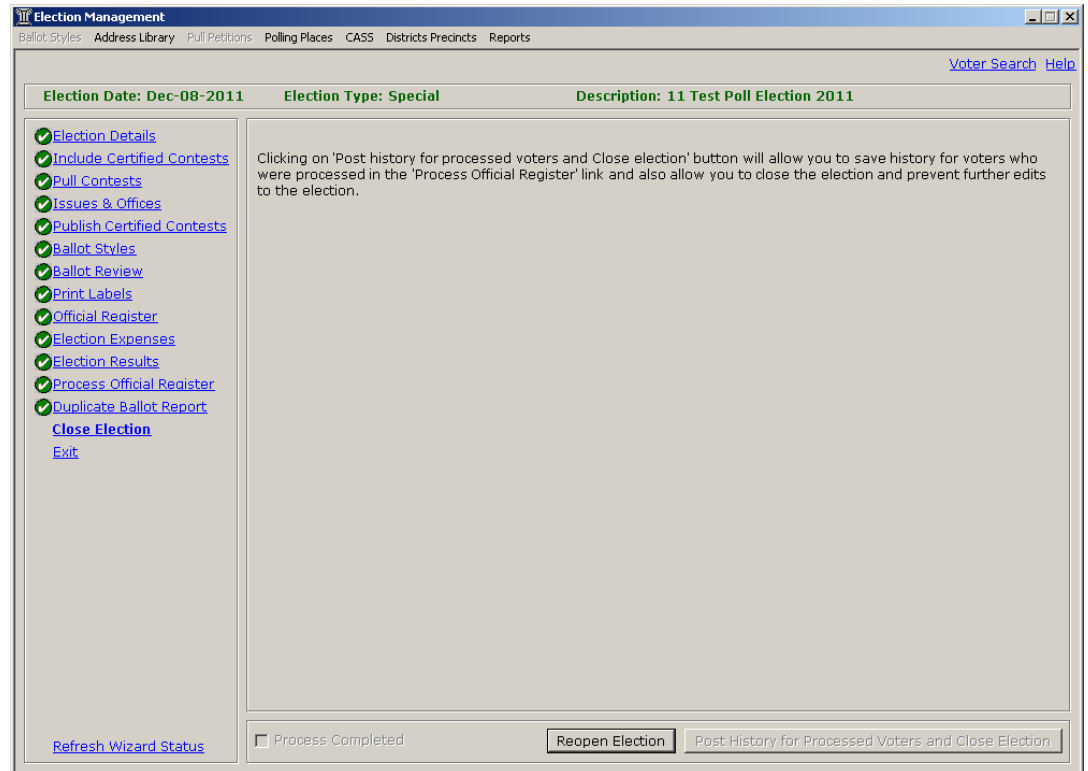
Close Election– Overview

- A reminder message will come up prompting you to review the Duplicate Ballot Report if you have not done so.
- You will be asked to confirm that you would like to close the election.
- Click Yes.



Close Election– Overview

- The election is now closed.
- To re-open the election click **Reopen Election**.
- Be sure to re-close the election as soon as you have made any changes.



Reports

Election Management– Available reports

BP-011: Ballot Batches Receiving

BP-012: Voter Listing By Ballot
Style

BP-013 : Undeliverable Ballots

BP-020: Duplicate Ballots Report

BP-034: Returned Ballots in
Date Range

EX-BP1: Voter Master Listing by
Election

The screenshot shows the 'Reports' application window. On the left is a sidebar with navigation links: Voter Registration, Election Management (highlighted with an orange arrow), Districts & Precincts, Petitions, Election Workers, Address Library, Labels, Ballot Processing, Master Lookups, and Close. The main area contains several filter sections: County (Missoula), Election (11 Example election 2011 - 12/08/2011), Batch Number (2), Offices, Candidate, Budget Group (All), Date Range (From/To), Party (All), and Party Description (Democratic, Republican, No Party). There are also checkboxes for Precincts, Range (From/To), Absentee Type, and NVRA Notice Type. At the bottom is a table of reports with columns for Code and Name, and a Sort Order section with up/down arrows. The table lists reports EX-E01 through E-006. Buttons for Export, Cancel, and Run Report are at the bottom right.

Code	Name
EX-E01	Export for Absentee Voters in an Election
E-001	Absentee Voters for an Election
E-004	Election Fifty Percent Eligibility Criteria For Measures
E-005	Election Districts Included In Election
E-006	Election Expenses Apportionment

As always, please feel free to contact the Help Desk,
at 1-866-541-6767, with any further questions you
have.

